

## P&P SIG Undergoes a Changing of the Guard with New Fiscal Year

By Audrey Cielinski Kessler

The Policies and Procedures SIG begins a new era with the start of the 1998-1999 fiscal year and the appointment of a new manager and a few members of the supporting cast.

The new manager, **Audrey Cielinski Kessler**, previously served as the SIG's newsletter editor, a position that is now held by **Michelle Anderson**. Assisting Michelle are **Lurette Arrowsmith** (formerly the SIG's chapter-level SIG liaison team leader) and **Susan Sereno**. Taking over the helm at the liaison team is **Elizabeth Turpin, Ph.D.** The membership team also has a replacement member, with assistance now provided by **Joy Osaka-Lu**. The programs and projects team remains vacant and eagerly awaits a willing volunteer.

Continuing in their positions from the previous fiscal year are **Nancy Ford Demeter** (public relations), **Kris Henige** (Web page), **Jerry Laing** (membership)

and **Audrey Cielinski Kessler** (LISTSERV).

With the new team in place, goals have been formulated for the fiscal year. Here's a summary of each team's goals:

### SIG Newsletter

- Solicit articles, edit and publish four issues of the SIG newsletter, *STEPS & SPECS*.
- Ensure that production deadlines are met.
- Enter SIG newsletter in STC's 1999 newsletter competition.

### Public Relations/Web Page

- Continue writing FAQs (frequently asked questions) for the SIG's Web page.
- Complete the editing and approval process for the first FAQ, on ISO 9000, written by SIG member **Ralph Robinson**.
- Upload the ISO 9000 FAQ to the SIG's Web page.
- Open contacts with other SIGs and outside organizations.

See *CHANGES*, p. 3

## A Welcome Note from the Editor

By Michelle Anderson

There have been a few changes to the Policies and Procedure SIG this fiscal year. I, for one, welcome these changes. Change opens the door to new and exciting challenges for everyone. With new challenges come new knowledge and a chance to grow both professionally and personally.

As the new editor of *STEPS & SPECS*, it is my hope that this newsletter will also serve as a forum for the active exchange of ideas and learning from others' experiences. The SIGs members are some of the most respected in our industry. I encourage each of you to share your knowledge and experience with everyone in the form of short articles to be published in the newsletter or by work-

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ing with other SIGS to share knowledge that crosses other areas of expertise, such as online help and information design.

This quarterly newsletter is a team effort. **Susan Sereno**, is responsible for the newsletter's layout and production, provides consulting in the areas of technical writing/editing and Web site production and management. **Lulette Arrowsmith**, coedits and coordinates the acquisition of articles for the newsletter. She is a technical trainer/editor and consultant for Deloitte Consulting, specializing in project management, reengineering and change management. As a team, we are committed to providing quality information to all of our members.

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## SIG LISTSERV Encourages Exchange of P&P Ideas

By Audrey Cielinski Kessler

While it has been in full operation for only a few months, the SIG's LISTSERV has caught members' attention and generated a modest amount of electronic discussion. Topics have ranged from generating a policy on Web-site development and the standardizing of procedural documentation to soliciting volunteers for SIG leadership positions and recruiting presentation participants for the society's 1999 annual conference.

This commitment includes entering *STEPS & SPECS* in the SIG newsletter competition at the society's 1999 annual conference in Cincinnati. We invite you to be part of the team effort through your article contributions.

If you have an idea for an article, please e-mail the editor, or submit articles to the address shown in the box on page 2. We look forward to a successful and informative year!

*Michelle Anderson is the technical writer/on-line documentation specialist at Downey Savings and Loan Association and teaches technical writing and on-line documentation classes for the California State University, Dominguez Hills Technical Writing Certification program.*

Discussion topic possibilities are virtually endless. The only restriction is that they be pertinent to some aspect of policies and procedures. If you have an idea, question or comment that's important to you, share it with your fellow P&P professionals by posting it on the SIG's LISTSERV.

To post a message to the list, address your e-mail to **stcppsig-l@stc.org**. Specify a subject, and type your message in the body.

See LISTSERV, p. 6

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## CHANGES

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- Update the SIG's brochure and pin for the 1999 annual conference.

### Membership

- Continue to mail welcome letter/packet to new members listed on the monthly membership rosters.
- Create a member-response card (to seek volunteers, acquire information about members' P&P interests and areas of expertise, and solicit newsletter article ideas and authors).
- Revise the welcome letter to reflect the change in SIG management and to note the inclusion of a second

enclosure item (member response-card in addition to a copy of the newsletter).

- Provide quarterly membership reports for inclusion in the newsletter.

### Liaison

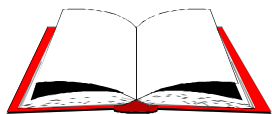
- Goals for this relatively new team are still being formulated and will be announced in the next newsletter.

### LISTSERV

- Subscribe and unsubscribe list participants as needed.
- Ensure that postings remain pertinent to the SIG and the P&P discipline.

If you would like to help with any of these activities—even if in just a small way—the contribution will be appreciated. For more information on how you can become an active member of your SIG, contact the appropriate team leader or your SIG manager (for phone numbers, e-mail addresses and postal addresses, see page 2). Get involved. Your contributions can make a difference.

*Audrey Cielinski Kessler is the owner of The Write Hand, a writing, editing and desktop publishing company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC and manager of the P&P SIG.*



## Book Review:

### *Establishing a System of Policies and Procedures*

By Tom Tomasovic

In his new book, *Establishing a System of Policies and Procedures*, Steve B. Page uses the subtitle "Setting Up a Successful Policies and Procedures System for Printed, On-line and Internet Manuals." By the author's own description, it is "a complete rewrite of my first book, *Business Policies and Procedures Handbook* (© 1984, Prentice-Hall, Inc.). Both were written to share the author's more than 25 years of experience in the area of policies and procedures documentation. The current volume primarily addresses

advances in technology which have moved many organizations toward online presentation of procedural documentation. It speaks very well for the author's commitment to continue the never-ending process of growth.

The book is targeted toward "[t]he policies and procedures professional, team leader, first-line supervisor, manager, strategic planner, computer professional, technical writer, trainer, forms professional or anyone who wants to establish a successful policies and procedures system." Writ-

ing any sort of book to target this diverse an audience is an ambitious undertaking, and Page has done a commendable job. He clearly addresses policies and procedures as an integral part of the business strategy and development for any organization. He regards the procedures analyst (or team) as an important part of any business effort.

The book is not long (152 pages), and the style provides for quick reading. What he could not prepare me for was the amount of information packed into a

*See BOOK REVIEW, p. 4*

limited number of words. I found myself thinking that many paragraphs were “intense” and that I wanted considerable time to reread, think about, ask questions and seek out other sources of information to which they pointed.

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***...He clearly addresses policies and procedures as an integral part of the business strategy and development for any organization...***

Page covers the process of creating policies and procedures from conception to completion, beginning with the most basic (and frequently misunderstood) distinction between a policy and a procedure. He provides valuable insight into the composition of a policies and procedures team (and the qualities needed for its members), its place within an organization and its relationship with other parts of the organization.

The book covers the mechanics of creating, revising and distributing (including the approval process) policies and procedures documentation, in both hard copy and online formats. Particular emphasis is

placed on establishing a strict format for the creation of documents, a system which turns procedure writing into a “fill in the blanks” exercise. The book, however, is **not** intended to trivialize the task. The intention is to make it more efficient, both for the writer, the reader and for those subject matter experts who may be expected to provide raw information.

Two other areas of the book came as a pleasant surprise: forms management and implementation and training. Page clearly sees these as within the purview of a policies and procedures function. The perspective of a professional gatherer and distributor of information can uniquely serve these areas, and organizations should consider the wisdom of this approach. Procedure analysts and their advocates should bring these additional possibilities to the attention of potential employers and managers.

Do I have any qualms about this book? Only minor ones. Considering the breadth of the information provided, it has a limited bibliography (only 27 entries). However, this is more of a practical guide than a research work, so it is certainly not a critical flaw, and the included references and Web site addresses provide ample opportunity for exploration. The book provides examples to illustrate the practical principles

covered, but some of these could have been more extensive. While the writing style can seem at times terse or even didactic, I came to realize that this was not an attempt to “beat anyone into submission” but rather a personal choice to present opinions clearly and succinctly.

There is much to recommend in this book, and I add my voice to its supporters. I only wish I had seen its predecessor years ago.

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***...The intention is to make it more efficient, both for the writer, the reader and for those subject matter experts who may be expected to provide raw information...***

Extensive additional information about the book is available at the author’s Web site, <http://users1.ee.net/spage/manual/index.htm>.

*For five years, Tom Tomasovic worked in the P&P Unit of NatWest Markets, both as a writer/editor and as a supervisor/developer. He previously reviewed Nimble Documentation for STEPS & SPECS. He created and presented a word processing system for the production of policies and procedures at the 1998 STC Annual Conference.*

# 68 Join P&P SIG from May through July

By Jerry A. Laing

From May to July, the P&P SIG gained 68 new members, bringing the total membership count to 497. We welcome the following new members:

- **Angela Anderson** (PA)
- **Jo Baer** (MN)
- **Danielle Ballou** (OH)
- **Micaela Barnhill** (VA)
- **Paula Bojsen** (Norway)
- **Jennifer Boswell** (Canada)
- **Michael Bowling** (CA)
- **Barbara Brock** (CA)
- **Cynthia Brock** (CA)
- **Dianna Browning** (CA)
- **Kimberly Call** (GA)
- **Julie Carlino** (SC)
- **Olivier Carrere** (France)
- **Connie Chappell** (MA)
- **Jane Cormack** (Canada)
- **Thomas Crosby** (TX)
- **Tricia Cusick** (NJ)
- **Todd Davis** (TX)
- **Nancy Delain** (MA)
- **Rob Domaschuk** (IL)
- **Tammy Domeier** (MN)
- **Susan Dorfman** (NJ)
- **Robert Foster** (Canada)
- **Jennifer Foust** (CA)
- **Connie Freeh** (OH)
- **Ellen Fuhrer** (NY)
- **Diana Gilliatt** (IN)
- **Lisa Gottlieb** (CA)
- **Edward Hanson** (CO)
- **Susan Heiress** (IL)
- **Robert Hodge** (TX)
- **Dean Horvath** (MD)
- **Gloria Hughes** (TN)
- **Cheryl Hultquist** (CA)
- **Regeania Hunter** (MI)
- **Jane Hurt** (Canada)
- **David Jennex** (Canada)
- **Mary Keane** (Canada)
- **Roger Kelly** (Canada)
- **Laurin Kinville** (NH)
- **Elizabeth Kryz** (AL)
- **Holly Lamb** (UT)
- **Kate Leggett** (CA)
- **Michael Mann** (WA)
- **Dolores Mayer** (NY)
- **Darren McKeen** (CO)
- **Lynn McManus** (WA)
- **David Mecredy** (MN)
- **Colleen Mesenbrink** (IL)
- **Janet Morrow** (TN)
- **Cynthia Moyers** (NV)
- **Kerry Newberry** (GA)
- **Missy Peterson** (IA)
- **Bernice Phelps-Davis** (SC)
- **Liza Potts** (FL)
- **Seema Rani** (CA)
- **Jennifer Rush** (Guam)
- **Kerri Russ** (CA)
- **Becky Rutherford** (Canada)
- **Jane Shirley** (TN)
- **Joshua Silverman** (VA)
- **Kathy Stephens** (Canada)
- **Mostefa Tadjeddine** (France)
- **Christine Thompke** (NC)
- **Glenn Voyles** (CA)
- **Virginia Ward** (CO)
- **Vivian Ware** (CA)
- **Stuart Whitehead** (Canada)

*Jerrold A. Laing is the P&P SIG membership team leader and a member of the San Gabriel (CA) chapter of STC. He can be contacted via email at [jal\\_docs@pacbell.net](mailto:jal_docs@pacbell.net) or by phone at (626) 445-0100.*

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*Deadline for the December 1998 issue:  
November 15!!!*

*Please email [Michelle\\_1962@yahoo.com](mailto:Michelle_1962@yahoo.com) with articles*

# Programs and Projects Team Needs Leader

By Audrey Cielinski Kessler

**P**ut your leadership skills to good use by volunteering to coordinate the P&P SIG's programs and projects team. The time commitment is light to moderate and the experience invaluable. If you think you might be interested in leading this team or would like to volunteer in a supporting role, contact **Audrey Cielinski Kessler** at 330/677-8598 or audck@aol.com for more information.

# P&P SIG on the Web

By Susan Sereno

**C**ome visit the Policies and Procedures Special Interest Group on the Web! Learn more about our group, find information about the P&P LISTSERV and the STC annual conference, and browse back issues of *STEPS & SPECS*.

The URL for our website is <http://www.stc.org/pics/ppsig/www/index.htm>.

*Susan Sereno is a Senior Consultant with Moreira Consulting. She provides consulting in the areas of technical writing/editing and Web site production.*

*LISTSERV  
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If you have not subscribed to the list, you can do so by addressing an e-mail message to **majordomo@stc.org**. In the body of the e-mail, type the following: **subscribe stcppsig-l <your e-mail address>**.

*Audrey Cielinski Kessler is the owner of The Write Hand, a writing, editing and desktop publishing company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC and manager of the P&P SIG.*

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## *STEPS & SPECS*

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*The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.*