Direction

The Newsletter of the STC Policies & Procedures Special Interest Group — 2nd Quarter 2010

Manager's Report: Webinars, Elections and More…

By Dawnell Claessen, SIG Manager

I really enjoyed the annual STC conference or rather the "Tech Comm Summit" in Dallas in May. This is the one time a year I get the chance to meet and interact with P&P SIG members and our SIG took advantage of every opportunity to do just that. Our progression session was a bit smaller than usual but we still managed to get every attendee a seat at a table.

Our business meeting included lunch and was shared with the QPI SIG. I expanded our original agenda with notes taken at the meeting and posted this on our SIG website. There are two big announcements to make!

P&P SIG Webinar

P&P SIG will be sponsoring a Webinar in October 2010. Raymond Urgo is developing a presentation on Task Analysis for Policies and Procedures. The webinar will run for about one hour and will be in the morning Pacific Time, mid-day Eastern Time and late afternoon and early evening UK and Europe Time. The cost will be deeply discounted for P&P SIG members. Watch the list serve and your inbox for more details about this webinar as they become available. You can read about Raymond Urgo here: http://www.urgoconsulting.com

P&P SIG Elections

Our SIG will be conducting its first leadership elections. Audrey Bezner will be organizing us to elect at least the SIG Manager every three years. We'd also like to elect a co-manager or assistant manager, if possible. I think our elections will be pretty straightforward, but they cannot happen without our SIG member involvement. At a minimum we need you to vote and we'd like you to consider helping out with the election or seeking office in one of our positions. So watch the list serve and your inbox for more information about SIG elections. If you have any comments or questions, or would like to put your name forward as a candidate, please feel free to email me at mail@dawnell.com or Audrey.Bezner@nissan-usa.com.

Member Stats

In the last issue of Direction, I had our membership counts wrong! Our new Membership Manager, Emily Kowal, has the accurate and current numbers in her update on page 3. Thank you Emily.

Volunteer News

P&P SIG continues to recruit volunteers. Right now, I'd say our biggest need is for the website. I'd like to have an index made of our articles and book reviews.

STC is planning to roll out a new media platform, so changes are coming and I want to make sure to preserve our content for future access.

If you don't feel you want to take on an ongoing volunteer position, why not volunteer to take on a task just to see how it goes? You can always volunteer to write an article for the newsletter or to write a book review. We'll even pay for the book!

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Find it fast...

Need the website URL? http://stcsig.org/pp/

Need the list serv URL? http://www.stcsig.org/pp/resources/listserv.php

Member Profile - Mary Louise Tucker

Direction: How long have you been a member of STC, and in particular, of the P&P SIG?

Mary Louise: I have been a member of the STC since about 1983 and a member of the Policies & Procedures SIG for about 4 years. I am also a member of the Quality & Process Improvement and Emerging Technologies SIGs.

Direction: Can you briefly describe your business background and how you got into technical communication?

Mary Louise: I met my first technical writer while working as a research assistant in the early 80s and she encouraged me to look at technical writing as a career. I was volunteered to write a brief instruction for a client when our firm was handing over a report generation feature. The work I did was held up as a template for other such deliverables. So really, I was a writer looking for a niche and my colleague's encouragement (and editing) propelled me into a new role.

In the mid 80s I relocated from the USA to Australia, first Sydney, on the east coast, then later to Adelaide, on the south coast of the continent. I have been a contractor for most of the last 20 years, and have been fortunate to land long term contracts of nine or more months, stretching up to 4 years (with time for travel breaks in between).

Direction: Tell us about your work (past and/or present) – responsibilities, challenges.

Mary Louise: During the 1980s and 1990s I mostly wrote and edited hardware and software user manuals or context sensitive help in a variety of industries. In the late 1990s a shift occurred in the marketplace due to strict controls being placed on financial institutions across Australia (this may well have saved us from some of the pain of the current global financial crisis, although we are not totally immune). Work shifted from software manuals and help text to policies and procedures in the financial services sector. Partially due to the cost of compliance in a highly regulated environment, Australia has seen a surge in mergers between financial institutions, particularly small and medium credit unions. That is where I've spent most of the last 10 years working as a contractor.

My roles have included traditional tasks of writing and editing as well as process re-engineering, implementing document management and workflow systems, training authors in use of project management and other business templates, process improvement facilitation, and now forms redesign.

The forms that I am currently redesigning are based on static PDF files. The new forms are created from scratch in Adobe LiveCycle Designer then rendered as dynamic PDF files. The forms must cater for three credit union brands and allow the users to dynamically build the form that suits their requirement for a product, service or other maintenance to their membership or accounts. Much of the dynamic quality is achieved through the use of JavaScript which we outsource to a JavaScript expert. The main challenges have been to identify and eliminate unnecessary forms, combine forms where possible, reuse fragments of text (field groupings) to achieve consistency, learn the capabilities of java script, and gain approval from stakeholders (always the biggest challenge).

Direction: Tell us about your audience.

Mary Louise: Depending on my contract, my audience has been the general public receiving a company's service or internal staff, and sometimes both. My redesigned forms will be used by both staff and the credit union's members.

Direction: What do you like most about your job?

Mary Louise: I enjoy the feeling of accomplishment at creating more useful forms that support staff through a process, allowing them to concentrate on the provision of the service, not the completion of the form.

Direction: For experienced P&P writers, what advice can you give to someone who wants to get into P&P documentation?

Mary Louise: Look for opportunities to create Policies & Procedures in your organisation or contribute as a SME to ensure you are visible. Even volunteer jobs, clubs and associations provide opportunities to create documents that you can add to your portfolio. If you contract, look for the industries where change is occurring.

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Member Profile - Mary Louise Tucker, continued

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

Mary Louise: Staying up-to-date with government legislation, industry self-regulation, market competition and mergers is the biggest documentation challenge in financial institutions in Australia at the moment. Keeping the message simple is a constant challenge as a writer.

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.

Mary Louise: I grew up in a large family in Chester County PA then graduated from Arizona State University in the 1970s. Required reading of Homer and pleasure reading of Kerouac set me off on my own odyssey of discovery after graduation. I settled in Australia permanently in the 1980s.

I am also a member of my local Society of Editors and was a committee member for our successful National Editor's Conference last October.

I am married to Andrew (a chef), have no children and live in Adelaide South Australia (Australia's largest wine producing state). My passions are technology, travel, reading, writing, the arts, food, wine, farmer's markets, yoga and cycling.

Mary Louise can be contacted at:

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Membership Update

Although both the STC Policies and Procedures SIG and STC have been affected by the dues changes and the economic downturn, the membership of both STC and our SIG is slowly increasing again.

As of the end of June, our SIG had 322 new and renewed members. In May, 21 new members joined our community, 3 current STC members rejoined the community, and 2 members dropped out of the community.

These lower member numbers compared to past years reflect a lower number of STC members overall.

At the end of May of this year, STC had 7249 new and renewed members—a 31% decrease compared to May 2009. The decrease in STC membership as a whole is likely because of dues changes, and the economic recession appears to have contributed to the Policies and Procedures SIG's current member numbers as well.

However, as the economy recovers, our membership numbers are likely to go up. As of June 14, STC membership has grown to 8011, and our SIG's membership has gone up to 322. Three percent of all STC members are in our SIG, and our membership numbers went up 2% in May 2010.

These steps are small, but they are steps up. We're looking forward to continued increasing membership numbers as the months go on.

Many thanks to Lloyd Tucker and Julia O'connor at the STC office for providing STC membership numbers.

— Emily Kowal, Membership Manager, P&P SIG

Got a membership question or issue? You can contact Emily at ecelaric@gmail.com.

Listserv Discussion: “Must Reads” for P&P Professionals

Our listserv recently received questions about P&P resources from Dr Kaye Adkins of Missouri Western Status University. The questions from Dr Adkins and responses from Dawnell Claessen and Emily Kowal are shown below.

“I'm a professor of technical communication whose focus is documentation, especially P&P guides. I'm putting together a bibliography (for my own use, the use of students, and for fellow teachers), and I'd like to know what you think are the "must read" books, articles and web sites for someone who wants to learn about P&P writing. I have my own list, but I thought I'd ask
this group.

Is there a book on your shelf that helped you get started writing P&P? One you still turn to? Are there articles that you have saved in a file (in a drawer or on your computer) that you found useful? Is there a web site that you have bookmarked? Or a blog that you read regularly?

Dr. Kaye Adkins
Associate Professor of English/Technical Communication
Director of Graduate Studies EFLJ
Missouri Western State University”

Dawnell’s Response:

“Dr. Kaye; Thank you for your post! I think all of us are very interested in the answer to the question: What's on YOUR bookshelf? - Especially from our peers.

At least once a week I check for new publications here: http://tc.eserver.org/dir/Policies-and-Procedures or here: http://tc.eserver.org/dir/Documentation

I am usually writing P&P with the purpose of demonstrating compliance, so for utility in my work I usually go directly to a particular reference. This could be a regulation, standard or process model.

Most of these are online and are living bodies of work, so I reference them online. For example, I just finished a DIACAP Compliance Demonstration, so I worked from a Department of Defense Directive and related Instruction - DoDD 8500. and DoDI 8510.2.

Next up could be a Common Criteria evaluation: http://www.commoncriteriaportal.org/ or a CMMI maturity grade assessment for one thing or another: http://www.sei.cmu.edu/process/index.cfm

I love **Techwr-1** as a resource: http://www.techwr-l.com/.

Raymond Urgo is a great resource for P&P Practitioners and he has a wonderful newsletter I am sure he'd be happy to share:
Urgo & Associates: http://www.urgoconsulting.com/

I think Stephen Page is an excellent resource and his books are must reads for newcomers to P&P Practice: http://www.companymanuals.com/author.htm and http://www.companymanuals.com/

For STC members, our SIG website at http://stcsig.org/pp/ has a lot of good stuff: I also have my big ole "hard copy" OED at http://www.oed.com/”

Dawnell K. Claessen

Manager, P&P SIG

Emily’s Response:

“Hi, Dr. Kaye,

I second many of Dawnell's recommendations: **tc.eserver.org** is awesome, but massive. I wish I had more time to check it! There's lots of information there.

Larry Peabody’s book *How to Write Policies, Procedures, and Task Outlines: Sending Clear Signals in Written Communication* helped me get the differences between policies, procedures, and work instructions straight; just for that explanation, it was worth the price. It’s listed on our Resources page, under Books. Stephen Page's books are all listed there as well, and I own them all. Even my boss, an auditor, has one!

The November 2005 issue of *Intercom* focused on policies and procedures, and it has a lot of great articles.

Because I manage policies, procedures and other controlled documents on an Intranet website, I've also found Jakob Nielsen's **Alertbox** very valuable and fascinating. He posts lots of free articles on web usability and a few on writing for the web. I think a short, clear, web-like writing

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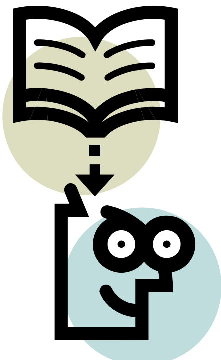
Book Review: Technical Communication 9th Edition by Mike Markel



By Steve Porvaznik

Reading Mike Markel's *Technical Communication 9th Edition* reminded me of a three-word mantra for professional writers and editors that I first read in best-selling author Stephen King's brilliant 1981 non-fiction book, Danse Macabre, that goes like this: **Remove unnecessary words**. If any written word, be it novel, prose, poetry, or a piece of technical writing, can be boiled down to its essence and still effectively convey everything it needs to – that is the sign of good writing. Of course, as Markel makes plain, that is just the start for a technical communicator.

Markel's latest work, which clocks in at 767 pages, may not necessarily follow that mantric advice – nor does King himself, who regularly writes very long novels and whose latest, Under the Dome, is 1,100 pages. However, one thing can be said about *Technical Communication 9th Edition*: this is the most comprehensive book on the technical communication craft that I have ever seen. As one who has been in this field for 20 years, this is one text book that was a pleasure to read and would be a great addition to any technical communicator's library.

Technical Communication has been used as a standard text book in college-level courses since its inception. The primary audience of this ninth edition remains the same as the first: students and instructors involved in learning and teaching the technical communication craft. However, that is not to say that professional technical writers and communicators would not benefit immensely from the book's contents. As Markel himself states in the Preface to Instructors, this edition "shows more explicitly how technical communication in the academy is connected to technical communication in the workplace." The contents within bear out this claim.

The book is comprised of four main parts that define the writing process and its output, including:

- the technical communication environment
- planning a document
- developing and testing the verbal and visual information and
- specifics on types of technical communication - including, of course, policies and procedures (covered in a chapter on definitions, descriptions, and instructions).

Markel's writing style is light and straight-forward, and the text moves along at a decent pace. Sections within chapters are nicely chunked so that enough details and examples are given to illustrate particular points, but not belabor them.

There is also plenty of online material to accompany the book, as well as real-world scenarios and questions at the end of each chapter that can be tackled as an exercise or simply read through to further drive home the points of the chapter. The occasional humorous anecdote is thrown in to keep down the stuffiness. No, it doesn't read like a Stephen King novel, but, as text books go, it was actually fun to read. Maybe that's also my enthusiasm about my profession coming through here.

For Policies and Procedures folks like us, there are many practical ways to apply the content of this book to our everyday work. Although some of the content is intuitive to me as a seasoned professional (but may not be for those just starting out), it was still interesting to read Markel's take on effectively planning, developing, and testing documentation and websites. Many of the points he makes I already knew to be true, but it's still nice to have my own suspicions confirmed in a professionally-written book such as this.

Markel's chapters and tips on writing coherent documents and effective sentences were particularly enlightening to me, causing me to re-proof and make immediate changes to current procedural documentation I am working on. Audience analysis, of course, is a key point covered throughout, and international concerns for those writing for other countries and cultures is also addressed. Markel does a great job describing specific techniques for learning about your audience, including the all-

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Book Review, continued

important, yet often-neglected usability testing of documentation or software before it is rolled out.

One topic that is referred to repeatedly is technical communication ethics, which definitely shed new light on this subject for me. Most people, including me, tend to think about obvious ethical concerns such as those covering legal and financial documentation, copyright law, plagiarism, and normal business ethics. Markel ponders many other ethics questions including the obligations of writers to their subject matter experts, users, their company, and to the general public. He states up front the importance of "honesty" in our content – making sure we are documenting what we know to be true and confirming its validity to the best of our ability.

The book points out that the writing of important documents such as policies and procedures must contain the kind of clear, "honest" language that dispels ambiguity, especially when not doing so could result in reputation damage of a department or company or even physical harm to someone based on what a policy or procedure says (or does not say or does not warn against). Though this is sometimes out of our control as writers, the book concludes that not validating our content to the best of our ability before publication would be unethical.

Overall, I highly recommend this book, both for the experienced professional and the newbie just starting out in the technical communication world.

Published 2010, Bedford St. Martin's

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Price $78.97

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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).

Must Reads, continued...

style would work for printed policies and procedures as well. I work with a wide audience, so I focus on readability.

Lynn Gaertner-Johnston also has a broader business writing blog that I've used and visited frequently. She focuses on keeping writing simple and positive, and I've taken a few style tips from her blog.

I also recommend Style: Towards Clarity and Grace by Joseph Williams. A classic!

Emily Kowal

Membership Manager, P&P SIG

Editor's Note: Also check out the book review on Mike Markel's well known text book, Technical Communication, elsewhere in this issue.