

Steps & Specs

The Newsletter of the STC Policies and Procedures Special Interest Group



Audrey Cielinski-Kessler: Distinguished Service

By Raymond E. Uργο



The STC Board of Directors has voted Audrey Cielinski-Kessler as the recipient of a **Distinguished SIG Service Award** for outstanding contribution to the Policies and Procedures SIG.

Audrey contributed substantially to our SIG from its beginnings in 1994, first as our newsletter editor for five years, then as the SIG's manager for another five years. During her term as editor, the newsletter won several

awards. When other leadership positions on the SIG management team fell vacant, Audrey filled in until she could find a replacement.

While she was SIG manager, our SIG's membership doubled and we rated above average in STC's performance standards for a SIG. Audrey oversaw the development of the SIG's first web site and also served on an STC committee to create a SIG member recognition award.

An ardent supporter of the SIG-sponsored sessions on policies and procedures communication at STC conferences, Audrey presented and served as moderator for many of these sessions.

Audrey will be formally presented with her award at the STC Annual Conference in Baltimore. The citation reads: "For sustained and dedicated contributions since 1994 to the Policies & Procedures Special

Interest Group: as manager, newsletter editor, and ardent supporter".

Congratulations, Audrey, on receiving this award, and many thanks for your outstanding service to the Policies & Procedures SIG!

In This Issue

Distinguished Service Award.....	1
Manager's Report.....	2
Employment Corner.....	2
Member Profile.....	3
New Name Contest.....	3
Hot Issues From the ListServ.....	4
Membership Report.....	4
Deadline for Articles.....	4

STC Conference 2004: Panel Moderator Wanted

Here's your chance to get to Baltimore! Volunteer to moderate the P&P SIG's panel discussion on Life Cycle Management of Policies and Procedures and you will receive a discount on the cost of registration!

Contact Dawnell Claessen at mail@dawnell.com or (210) 279-1139 to learn more about this exciting opportunity.

Steps & Specs is published quarterly by the Society for Technical Communication's Policies and Procedures Special Interest Group.

SIG Leadership Team

SIG Manager and Information Request Coordinator:

Raymond E. Urgo
323/957-9317 (office)
rurgo@urgoconsulting.com

Conference Proposal Coordinator:

Dawnell K. Claessen
210/520-2558 (office)
mail@dawnell.com

Membership Coordinator:

Candie McKee
405/974-5628 (office)
405/919-1305 (home)
candiemckee@sbcglobal.net

Listserv Coordinator:

Eddy Frost
800/949-6753 ext 206 (office)
603/234-2711 (home)
EddyFrost@ringwood.com

Webmaster:

Janice Haskins
jhaskins@logic.bm

Newsletter, Editor:

Lois Marsh
416/359/6751 (office)
lois.marsh@bmonb.com

Newsletter, Assistant Editor:

Kelli L. Pharo
407/740-8143 ext 189 (office)
407/886-4031
klpharo@pbsj.com

Newsletter, Layout Specialist:

Position Open

Newsletter, Proofreader:

Gem Smith
713/780/4676 (office)
713/461/5105 (home)
gem@facetscom.com

Society for Technical Communication

901 N. Stuart Street, Suite 904
Arlington, VA 22203-1822
703/522-4114 (office)
703/522-2075 (fax)
http://www/stc.org

© 2004 Society for Technical Communication. All rights reserved.

Manager's Report: Start the Year Off Right With a P&P Checkup!

By Raymond E. Urgo

Welcome to 2004! How swiftly time marches on. It's hard to believe a full decade has passed since Microsoft released its Windows 95 operating system, and the STC board approved the petition for the formation of the Policies & Procedures Special Interest Group.

Before you know it, tomorrow is yesterday, and yesterday is, well, when all your troubles seemed so far away.

What about the policies and procedures documents you create for organizations? Are they changing with the times?

Recently, two P&P SIG members asked me whether their organizations should conduct regular reviews on existing P&P documents, and if so, how often and in what ways.

Regular P&P document "checkups" are similar to scheduling regular dental and motor vehicle checkups. They each enhance the value for their respective

purpose: teeth that are healthy, vehicles that are safe and last longer, P&P documents that reflect current conditions. Regular reviews also provide a higher level of respectability and acceptance for the P&P information development process.

If the organizations you serve are not conducting regular reviews, perhaps the dawn of this new year is the ideal time to initiate and enforce a P&P document checkup plan as part of your organization's P&P process and investment.

In so doing, you will probably inherit more P&P information development work to meet the needed changes, but you will also demonstrate the added value you bring to the table.

May 2004 be a fruitful year for you and the organizations that you serve through P&P information development!

Employment Corner – California Calling!

Escoe Bliss Communication, Inc. is recruiting several experienced policies and procedures (P&P) writers and editors for immediate assignment at an established and growing lending institution in Calabasas Hills, California.

Professional, team atmosphere, working with other highly qualified P&P writers and editors. Assignment is expected to be approximately 9 or 10 weeks, full-time, onsite.

No telecommuting is permitted, but four, 10-hour days per week may be possible. Compensation is \$45 per hour as a 1099, without benefits.

Additional compensation is possible if the candidate lives far from the job site and needs to stay at local lodging during the work week.

To apply, or for more information, contact Adrienne Escoe at aescoe@escoebliss.com.

Member Profile: Kelli L. Pharo, Technical Writer and Editor

S&S: Can you briefly describe your background for our readers?

KP: Before I figured out what I wanted to do, I held various jobs from guest relations representative for the Florida Marlins to working with horses: cleaning stalls, hot-walking, feeding, grooming, and saddling.

I've done data-entry, taken phone orders, worked a help desk, made collection calls, filed medical claims, received and shipped merchandise in a warehouse, and sold empty containers on a sales route. Today I'm a writer, a grammarian, a planner, and a perfectionist!

S&S: Tell us about your work responsibilities.

KP: I work for PBS&J, an engineering and planning company, as a technical editor in their aviation program.

My main responsibility is to ensure documents such as environmental assessments, master security plans, and minimum development standards are error-free, easy to read, and well-formatted.

I also maintain our standard operating procedures manual and style guide. This is where I get involved in P&P.

S&S: What do you like most about your job?

KP: I work for a great company that gives me a lot of freedom and support. I am the only technical writer/editor in my program, so I am looked to as the expert. That's a big honor and a lot of fun. I really like playing with words and sentence structure and achieving clarity and flow.

I also like the desktop publishing aspect of my job. I enjoy creating new and interesting document layouts using formatting and graphics.

S&S: Can you describe some of your P&P communication projects?

KP: I can think of two fun projects that I've done. For my Technical Communication III class, I created a SOP for the stable where I worked and rode. The owner/trainer is a well-educated, articulate woman who realized the need for such a document.

When I approached her with an offer to create the SOP for free, she knew a good thing when she heard it. I was given pretty much a free rein to design the document as I saw fit. It was a great project and is still in use by the barn staff to this day.

The other P&P project that I enjoyed was a style guide that I created for my current employer.

I realized the need for a program style guide, and set out to write it, create graphics for it, design and produce it. It was a big hit and is now on our national aviation website.

S&S: Tell us about your involvement in STC.

KP: I first became active in STC as a student at the University of Central Florida, attending meetings of the Orlando chapter. As a student, I won the Melissa Pellegrin Scholarship, an Orlando STC chapter award. I enjoy attending the annual STC conferences, and fortunately work for a company that supports, and pays for, my membership and attendance.

S&S: What do you like to do outside of P&P?

KP: My husband and I spend our time on home-improvement projects; volunteering at our church; and training our three dogs. Our schedule will become significantly fuller this summer, as my husband and I travel to Russia to adopt our first child together.

Kelli Pharo is a Technical Editor in Florida, U.S.A. She can be reached at klpharo@pbsj.com.

Enter the P&P Newsletter Name Contest!

As the SIG's first newsletter, Steps & Specs has a long and successful track record. It's ready for a fresh new name that reflects the diversity of our membership and their work in the Policies & Procedures field. Ideally, the new name would highlight one or more of these themes:

- What the business of Policies and Procedures is about today
- Our image as forward-thinking writers and editors in a rapidly changing environment
- Our commitment to accuracy and usability, especially in regulated industries

The contest winner will receive copies of **RoboInfo Pro** and **RoboPDF**, from Macromedia. Submit your entry by April 5th 2004 to the Editor at lois.marsh@bmonb.com. The winner will be selected by the P&P SIG newsletter committee and announced at the STC Conference. The contest is open only to active members of STC and the Policies & Procedures SIG. For other contest rules, contact the Editor.

Hot Issues from the Listserv: Developing Online Policies and Procedures

By Mike Hamilton, as excerpted with his permission from the P&P SIG Listserv.

If you have ever done online Help development before, that can be a hindrance when shifting to online policies and procedures (P&P). It is a different focus.

Where online Help is all about documenting anything that a user might do with a single software application, online P&P is both narrower and broader at the same time. It is narrower because it usually describes only the one acceptable way (or corporate preferred way) of accomplishing a goal, but broader because it documents much more than a single application.

It is not uncommon for an online procedure to describe multiple software applications and even hardware interactions all in a single procedure. One recommendation that I do have is to look at things from a workflow perspective.

There are far too many intranet sites where the accounting procedures are only available on

the accounting page and the HR procedures are only available on the HR page, etc.

Intranets and online P&P can be far more effective if pages are dedicated to specific job tasks such as a sales person who has to travel. In most organizations the sales person will have to scour the Intranet to find the travel policy (HR page), the expense reporting policy (accounting page), the customer appointment log (sales page), the online travel booking page (could be anything from Extranet, to employee using a travel site), etc.

Think about how inefficient this process is when the employee has to hunt down all this information. Then multiply that inefficiency by 20, 50, or 100 sales staff. It would be far more effective to have a Sales Travel Page where you provide a macro procedure with each step having a link to the policy, form, or information necessary to conclude that step:

one-stop shopping for the sales person who has to travel.

This can be a huge paradigm shift from the "Intranet mirrors the Org chart" thinking that prevails in most organizations, so try to start small, like a single team or department. Generate some success in this pilot approach, then leverage that small success into another team or department.

Here are some good (but hard to find) books to learn more:

Electronic Performance Support System
by Gloria Gery

Designing and Developing Electronic Performance Support Systems
by L. Brown

Introduction to Policies and Procedures
by Raymond E. Urgo

Mike Hamilton is RoboHelp Product Manager at Macromedia. He can be reached at mhamilton@macromedia.com

Membership Report

In the last quarter of 2003, ninety (90) new members joined the P&P SIG. This steady growth indicates how important policies and procedures are (and always have been) to the world of technical communications, and how important SIGs are to the Society membership.

Although most of our members are in the U.S. and Canada, some of us hail from as far away as Venezuela, Israel, Belgium, France, Australia, Ireland, England, Denmark, and elsewhere. It's clear that our SIG benefits from a well-rounded group of writers who can share their experience and new ideas with each other.

Deadline for Articles – Next Issue of Steps & Specs: April 5

Got some great ideas for improving P&P? Want to sound off about a pet peeve? Just want to see your name in print? Have your article ready no later than April 5, 2004 for the next issue of **Steps & Specs**. E-mail it to: lois.marsh@bmonb.com.