Direction

The Newsletter of the STC Policies & Procedures Special Interest Group

2nd/3rd Quarters 2008

By Dawnell Claessen, SIG Co-Manager

Manager's Report: A Philadelphia Story

Well here it is at last...you may have noticed we didn't publish our Q2 issue as scheduled in June due to resourcing issues. Instead, this issue combines both Q2 and Q3 articles.

Although it's a bit in the past now, I'd like to tell you about our June conference activities.

The Policies and Procedures SIG had a great time and a very visible presence at the annual STC Conference in Philadelphia! I want to take this opportunity to again thank all our speakers and volunteers for their hard work in making sure SIG members attending the conference had a positive and relevant experience.

The wonderfully pedestrian-friendly downtown Philadelphia area enhanced the conference-going experience so much. There was always somewhere different to buy affordable coffee and snacks on the way between the convention center and the hotel. The Reading Terminal Station (between the hotel and the convention center) has been transformed into a wonderful collection of quick stop restaurants and shops and kiosks. The Pennsylvania Dutch Community runs a bakery shop in the terminal which nearly drove us mad with its baking aromas on Wednesday morning!

Lois Marsh and I attended Sunday's leadership day activities. This gave us an opportunity to meet with other SIG leaders and brainstorm a bit. Then we had a great turnout at our reception table during Sunday evening's Welcome Reception.

Monday morning, we had our breakfast meeting with 25 people in attendance – a great turnout for a 7:30 am meeting. We quickly zipped through our business and got down to a really engaging discussion of our work and our practice.

We then held a draw for SIG luncheon tickets and some very cool mouse pads provided by MadCap Software .

On Tuesday afternoon we had our joint progression session with QPI and ES&H, which was very well attended. We stayed over to chat and share ideas with folks who lingered or ran in to catch the last hour or just one topic of the session. This is JUST the sort of thing that I enjoy, although by this time I was losing my voice!

On Wednesday AM Raymond Urgo gave his presentation. This rather advanced topic "Assessing the Maturity Grade of your P&P" was very well attended and again VERY participatory.

Our SIG luncheon was on Wednesday was also well attended. We talked about new regulations, pesky approval processes and all those wonderful things P&P practitioners have in common.

Many speakers uploaded their conference presentation and session materials to the STC website. I know I did and so did Raymond.

If you are interested in any of those session materials, here is a link: http://www.stc.org/edu/55thConf/index.asp

I am already looking forward to next year and I sincerely hope to see ALL of you next year in Atlanta. If you want to present as part of our SIG progression, start thinking about a topic. We will also be looking for speakers for more advanced P&P topics.

Inside this issue:

Clarity For Editing

By Justin Baker

When I was a young technical editor, I was confused by the various technical editing stages within any one particular editing model not to mention all of the competing editing models. Everywhere I turned, there seemed to be a competing name and a competing label for each aspect of editing. For example, substantive editing might be equal to developmental editing in one particular editing model but may mean different things in another editing model.

I was like a movie character in one of those old clichéd film montages where the character staggers past one blinking neon sign after another, completely perplexed and exhausted. To this day, I still do not adhere mentally to *The Levels of Edit*[1] with its nine editing levels. Instead, I have sought to develop my own editing model based on my experience as a technical editor.

Some theoretical physicists believe that the underlying formula that explains the theory of everything in the universe will turn out to be a simple, elegant formula. Life is indeed complex, but at the mountaintop of knowledge, things must have a simplicity that is understood by all. I believe that to be true of the levels of edit.

If some editors are not clear on the levels of edit that it takes to edit a document, then most managers are certainly not clear on the levels of edit, either. As we all know, communicating our profession's conceptual models to managers is very difficult. Most managers (excluding technical communication managers) think of writing and editing as a black box activity. They see the document go in; they see the document come out. Most managers are blissfully ignorant of the complexities of our job. Their blissful ignorance may be partly our fault. Perhaps we have not communicated the nature of our activities in the simplest possible way.

From a particular perspective, this is a usability issue. We as technical communicators are focused on usability more and more, so when the conceptual models in our own profession are not easily understandable, then we need to simplify them. I think it is time to simplify and relabel the editing levels so that they are straightforward and intuitive, at least at the top level of organization. *The Levels of Edit* espouses no less than nine editing levels, and labels for some of these editing levels are surely not intuitive to either some editors or managers. I propose simplifying the editing model down to three editing levels at the very top level of organization.

Knowledge Editing

I propose that the first editing level be titled knowledge editing. Knowledge editing refers to the technical subject matter in a document, both in text form as well as in illustration form. In the editing model I propose, the knowledge editing level would be divided into four sub-levels:

- knowledge accuracy
- knowledge completeness
- knowledge logic
- knowledge hierarchy

The knowledge accuracy and knowledge completeness sub-levels would ensure that the subject matter is accurate and complete. The knowledge logic editing sub-level would ensure that the a-b-c logic of the subject matter is sound. The knowledge hierarchy editing sub-level would ensure that the 1.0, 1.1, 1.1.1 hierarchy of the subject matter is sensible. Of course, these editing sub-levels might be performed simultaneously.

Language Editing

I propose that the second editing level be titled language editing. Language editing refers to the technical subject matter in a document, both in text form as well as in illustration form. Language editing would focus on the manifestation of the knowledge through words and images. This level of editing would encompass the following editing sub-levels:

- sentence structure
- grammar
- diction
- punctuation
- spelling
- character mechanics (font formatting of individual letters and words)

For visual text, language editing refers to the particular standard visual elements used in any given type of illustration. For example, use-case diagrams use particular industry-standard visual elements that must be used in

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Clarity For Editing, Continued

the diagram. For network diagrams, some companies might want to consistently use the same network server icon. The language editing level would ensure that the text language as well as the visual language are standardized.

Layout Editing

I propose that the third editing level be titled layout editing. Layout editing focuses on the following editing sub-levels:

- industry standard, large-scale document structures
- text and illustration spacing
- large-scale font formatting (basic font formatting of entire paragraphs, sections, chapters, etc.)
- miscellaneous layout mechanisms such as running headers, page numbers, and hyperlinks

Conclusion

In the editing-level conceptual model that I propose, I also do not consider it necessary to build in a layer that prioritizes the levels of editing as was proposed in *The Levels of Edit* or a Council of Biology Editors (CBE) publication[2] that proposed the reprioritization of the editing levels found in *The Levels of Edit*. While professionally I admire the integrity of those two publications, from my perspective, I respectfully propose that simplicity is better when it comes to identifying the top-level organization of technical editing. It is enough to give technical editors the basic editing levels and sub-levels and let them decide what takes priority.

I have not covered all the possible nooks and crannies of the editing landscape in this brief article, but it doesn't matter. Even if I had covered every single aspect of editing, there would be arguments about the arrangement of the editing levels and sub-levels.

The point is that the editing conceptual model needs to be simplified at least at the top editing level. I say knowledge editing, language editing, and layout editing. You may say something else. And we can debate on the editing sub-levels that lay beneath. I'm merely making a call for clarity.

Justin Baker has been a technical writer and editor for over ten years. He is a Senior Member of the STC. You can reach him at justin_c_baker@yahoo.com.

Endnotes

[1] Van Buren, Robert, and Mary Fran Buehler. *The Levels of Edit*, 2nd Ed. Pasadena: Jet Propulsion Laboratory California Institute of Technology, 1980.

[2] Nadziejka, David. 1999. Council of Biology Editors Guidelines, Number 4: Levels of Technical Editing. ISBN 0-914349-5-0. Reston, VA: Council of Biology Editors.

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Eddy Frost, List Serv Manager and
Chris Eideh, List Serv Volunteer

To sign up, or view or change your discussion list preferences, visit: http://mailman.stc.org/mailman/listinfo/stc_ppsig.

Then, to post to the discussion list, just send an email to stc_ppsig@mailman.stc.org.

Our contact information for listserv related issues or questions is given at the bottom of the web page.

See you on The Lists!

HIGHLIGHTS FROM THE 55th STC CONFERENCE

The Power (and Risk) of PowerPoint

By Lois Marsh

> *"If effective communication is about getting messages across, then slides should focus on conveying these messages: not the detailed information (the what), but what this information means to the audience (the so what)."*
>
> *— Jean-Luc Doumont, "The Cognitive Style of PowerPoint: Slides Are Not All Evil", Technical Communication, February 2005*

Although my immediate team's main focus is on process analysis and policy & procedure development, the group we support specializes in measuring the financial risks of trading and underwriting for a large financial institution. In light of recent stresses to the credit and stock markets and the ever more complex derivative products, we've been asked to help our reporting group improve their PowerPoint presentations to make the implications of the risks reported more easily understood.

Great project, but where to start? Other than making sure slides are clean and the language easy to understand, what else could I contribute? STC to the rescue! In June, I attended two excellent presentations on scientific communication and the use of PowerPoint at STC's 55th annual conference. They focused on the work of two proponents of effective scientific communication: Jean-Luc Doumont, an engineer and PhD in applied physics and Edward R. Tufte, Professor Emeritus of statistics and information design at Yale University ("the da Vinci of Data").

What did I learn? That PowerPoint is the de facto standard for delivering presentations on scientific and business data, but many of us don't use this tool effectively. We cram too much text onto each slide and fail to 'tell a story' throughout the presentation. There is little use of color or other design elements to guide the reader through the text. As a result, audiences are tuning out from boring or unintelligible PowerPoint presentations.

So what's the answer? There are two challenges: one format and design-related, the other content-related. Should we use more color? Yes, for sure. Animation? Yes, but only if it contributes to the discussion. One presenter showed us a slide displaying radiation data. Animation was added (the graph populated in one second increments) and also the sound of a Geiger counter that got louder as the amount of radiation increased. Extremely dramatic and effective!

The bigger challenge is to ensure the viewer or reader can quickly grasp a central message from each slide, and relate it to the rest of the presentation. We need to focus on the 'so what' and ensure that our slides transition logically so the reader/listener can follow the 'story'. Jean-Luc Doumont suggests that each individual slide should feature:

- a clear message supported by visual evidence
- as little text as possible
- headlines of not more than two lines
- full sentences with subjects and verbs
- the audience should be able to grasp the slide 'as a single thought' and at the same time grasp its relationship to a narrative or argument of which it is an integral part

How important is getting the message across effectively? Here's a quote from the Journal of Science Communication about the devastating tsunami in 2004:

> *"At the heart of the devastation caused by the Indian Ocean tsunamis lies a failure to communicate scientific information adequately to either decision-makers or the community. Important lessons are to be learnt about the need for professional [communications] skills."*

Experts in risk management face similar challenges to those in other highly technical fields (although not usually life-threatening). By adopting some of the principles suggested by Doumont and Tufte, we hope to get the message out to our audience in a more powerful way.

HIGHLIGHTS FROM THE 55th STC CONFERENCE, continued...

Highly Rated P&P Presentation by Raymond Urgo

By Pamela Ovington

Raymond Urgo's session, "Assessing the Maturity Grade of Policies & Procedures Programs" at the 55th annual conference in June was a great success. Evaluation scores placed Raymond in the top ten percent of 129 speakers. Most attendees gave full marks for the quality and delivery of content and made many favorable comments about the materials and practice exercises.

A number of attendees also indicated a desire for P&P presentations at future conferences. Suggested topic ideas included organizing P&P content, information architecture for P&P, content management and discussion of standard P&P document types and templates. Quality presentations such as this cannot help but stimulate interest and promote standards in the writing of P&P. Well done, Raymond.

To view the slides from Raymond's presentation, go to the STC site at http://www.stc.org/edu/55thConf/index.asp.

Got an idea for a P&P presentation topic for the 2009 conference? Contact Dawnell Claessen at mail@dawnell.com.

VOLUNTEER NEWS

Newest Addition to the Team

Donna Monico—STC Policies and Procedures SIG Membership Manager

This month we are delighted to welcome Donna Monico who is now STC P&P SIG Membership Manager. Donna has worked at Sepracor, Inc. located in Marlborough, Massachusetts since 1998. She first began as Senior Administrative Assistant, then moved on to Project Coordinator, Senior Project Coordinator, and now her current role as Project Manager, Document Administration Corporate Quality Compliance.

In her current position, Donna supervises and manages a quality documentation system consisting of compliance standards, memorandum of standards, standard operating procedures, and work instructions. Her primary focus is to ensure a thorough review of quality documents including proofreading, editing and formatting documents for style consistency.

Donna has a Bachelor of Arts degree in English Literature and Writing from Clark University, and a Certificate for TechComm 101 from STC.

Donna is thrilled to be acting as membership manager and looks forward to helping STC grow their membership!

You can contact Donna about membership issues at donna.monico@sepracor.com.

Member Profile: Joan Oliver

Direction: Welcome Joan! Please tell us a bit about your business background.

Joan: I have a combined B.A. in French and Spanish literature and B.A. in English Literature. I currently work for the Royal Canadian Mounted Police (RCMP). Previous to working for the RCMP, I did short term work for other Canadian federal government departments such as Environment Canada and Transport Canada. I have worked for the RCMP for 20 years, 17 of which have been in a writing capacity, including Communications. For the past 11 years, I have been working in policies and procedures.

Direction: Tell us about your work – responsibilities, challenges.

Joan: I work for Polices and Publications Section (PPS), Information Management Branch. Our section manages the official national policies and procedures for the RCMP as well as its historical collection of policies and procedures. As a Senior Writer/Editor in PPS, I predominately edit the policies and procedures written by the Subject Matter Experts (SME). I also lecture on a course entitled Directives Writing, which highlights the specific writing style (Playscript) used for the RCMP manuals. We lecture on three courses per year in different locations across the country. As one of two senior writers, I train new editors to our section and troubleshoot regarding a myriad of issues.

The biggest challenge I face is trying to make the teaching policies and procedures interesting.

Direction: Tell us about your audience.

Joan: Our audience is the entire complement of RCMP employees, which includes police officers, employees working in specialty areas such as IT and forensics as well as public service employees.

Direction: What do you like most about your job?

Joan: I love my job because of the variety of subject areas that we deal with in our Section, from operational matters such as fingerprints to administrative matters like official languages. It keeps me ever learning and ever challenged.

Direction: What advice can you give to someone who wants to get into P&P documentation?

Joan: I would advise anyone who wants to get into P&P documentation to ensure that although basic, he or she should be sure to have a thorough grasp of the meaning of P&P, which I find elusive. Many people seem to define these terms differently, especially "policies".

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

Joan: I believe the biggest challenge in this area is conveying to SMEs that e-mail messages to employees do not constitute official policies and procedures. E-mail messages are only retained for a short period and are inaccessible to employees who may be on vacation or other extended leave for reasons such as education, illness, maternity or paternity. In addition, the technological age also facilitates the publication of information directly on an SME's website, which is often being considered as official policies and procedures, which of course they are not unless linked to the official policies and procedures in a manual system.

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.

Joan: I live in the city of Ottawa, the capital of Canada, with my husband and two children. I am also caregiver to my aged mother who had a stroke a few years ago. I love to read, paint, take walks and play the piano (ever a learner). I volunteer at my local church in a variety of capacities, including being the Head of the Sunday School program. I also volunteer at local Bible College, again in various leadership capacities.

Joan Oliver can be reached at joan.oliver@rcmp-grc.gc.ca.

Member Profile: Derek Scott

Direction: Tell us about your work – responsibilities, challenges.

Derek I stumbled into technical writing when I landed a job writing automotive repair manuals for Chilton Book Company as a fresh-out-of-college English major in 1995.

I've been a life-long car nut, so this was a natural way for me to blend my interests with my education. Little did I know this choice would lead to 13 years of technical writing experience in many fields including finance, telecom, and most recently, project management.

I work at the Project Management Institute (PMI) as an IT document specialist. That's HR-speak for senior technical writer. I write and edit the user guides, online help, training materials, and policies and the procedures that PMI staff use to support PMI members and credential holders around the world. I describe how the policies and procedures behind the organization's credentials – such as the PMP® – are applied through the internal and external business systems and websites maintained by PMI's IT department.

Direction: Tell us about your audience.

Derek: I write for both internal and external audiences at PMI. Because PMI is a global organization, I must keep a global perspective when writing for all audiences. The first audience is Customer Care. This group is the first point of contact for PMI members and credential holders who may have questions about products, services, membership or credentials.

This audience needs to understand the organization's internal policies and procedures so they can thoroughly answer questions from members and credential holders. The second audience includes the behind-the-scenes administrators who need comprehensive information stating how the business policies behind PMI's IT systems are applied to practical situations. Consistency is the key for both audiences. Policies in the credential handbooks must carry through the online help, user guides and FAQ text features in the application interface.

Additionally, I write IT policies and procedures to show staff members how to properly use the organization's technology resources. For example, the organization's information security policy describes how IT protects data and information.

Direction: What do you like most about your job?

Derek: Language is fun – it's a toolbox and the writer selects the best tool for the job. Technical writing helps me discover how to use concise language and graphics to describe complex concepts. My goal is to increase customer satisfaction and business efficiency through clear, accurate technical communication. I seek out the tough or hard-to-understand procedures and create concise, descriptive explanations.

Additionally, there is always a new communication model I can learn and apply to my documentation. When I began my career, online help was all the rage, but now I'm investigating wikis as a way to collaboratively capture work instructions and other procedures that need editorial review and input from staff. I like to find ways to make technical writing and policy and procedure communication informative, accurate and engaging. I also enjoy helping others gain confidence through well-written documents. I blend aspects of policy and procedure writing with training and user guides to anticipate reader's questions and provide clear answers.

Direction: What advice can you give to someone who wants to get into P&P documentation?

Derek: I approach every assignment as a way to learn new tools and gain insight to audience needs. Policy and procedure communication requires the writer to analyze how an organization's documents and processes relate to one another. You need an open mind and a willingness to listen.

It is also important to consider the many different document types that could best fit an organization. I don't think there is one "right" way to do it. PMI is the second organization where I have suggested organizing policy and procedure documents into a framework. A policy framework

Member Profile: Derek Scott, continued

defines how an organization's set of documents fit together to form a package of information. The policy framework also helps describe the value of technical communication. The image at the end of this article is one I put together to show a simple policy framework.

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

Derek: It is tough to be the lone technical writer coming into a new organization with little or no documentation and advance the need for a policies and procedures program at the same time. However, this role has shown me many ways to build my career by learning from others. I've also learned the importance of showing readers how the policy relates to other types of documents. Technical writers must understand how policies and procedures help an organization communicate and function efficiently. With this knowledge, writers can offer more pertinent and useful online help, user guides and training materials.

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.

Derek: I live in West Chester, Pennsylvania with my wife Abbey and son James. We have two cats, Ernie and Tigger. In my spare time I enjoy surf fishing along the Atlantic coast and restoring and repairing older BMW automobiles. Call me old school, but I will tinker with just about any gas engine that I can get my hands on. Lately, I've accumulated three old Gravely two-wheel garden tractors. I also enjoy gardening and landscaping – I needed an excuse to use the tractors....

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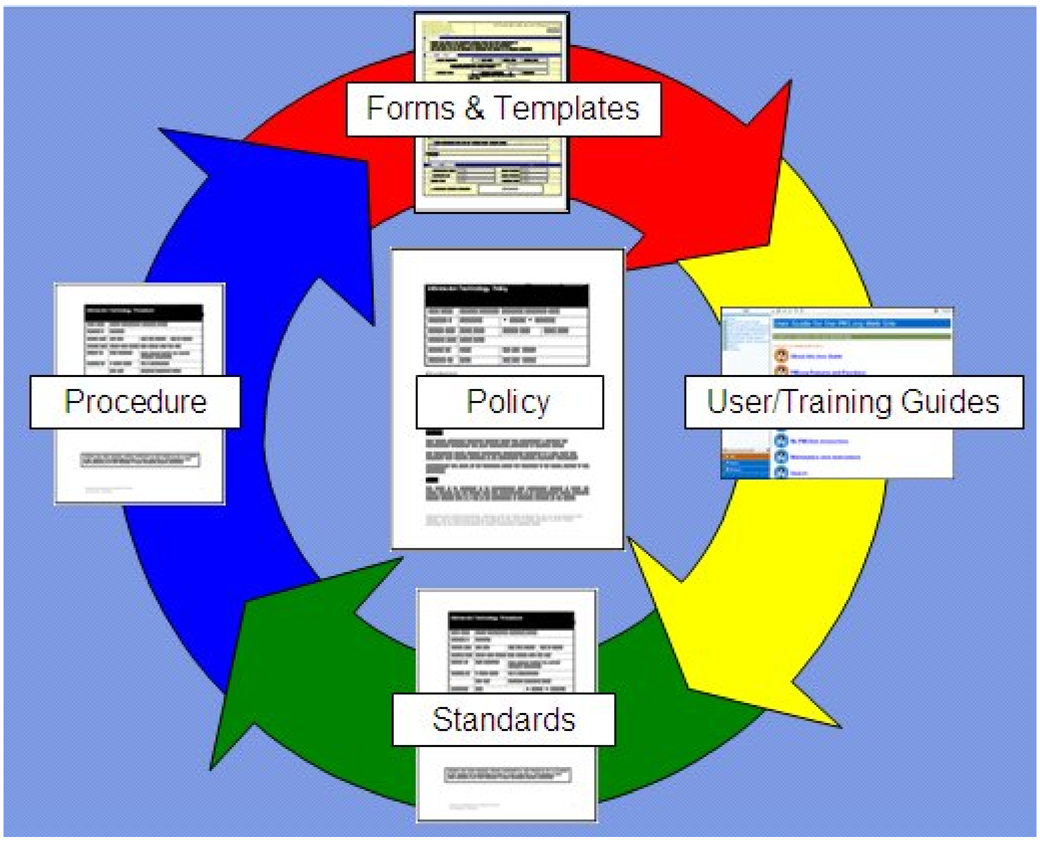
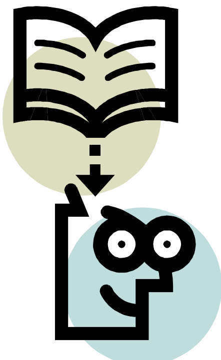


Derek Scott's Policy Framework Diagram

Book Review: Technical Editing—The Practical Guide for Editors and Writers *by* Judith A. Tarutz



By Lois Marsh

Judith Tarutz' book on Technical Editing is an absolute goldmine of learning about editing for everyone who writes or works with writers. It's a collection of wisdom based on her extensive experience rather than a pure reference on grammatical rules and styles. The book is organized in three sections called "The Editor's Role", "The Editor's Job", and "The Editor's Career".

Thinking of going into editing or ready to hire one? Tarutz devotes a large section to editing as a career and how the role has evolved outside the publishing industry (i.e., government, industry and non-profits). She includes job descriptions and titles, sample interview questions, and even a section called "Being an Editor: What's Bad About It"!

When it comes to the business of editing, Tarutz explains not only all the different levels of edit, but also the different types of editor and permutations of writer/editor. Here's her description of a Technical Editor:

"In addition to doing everything the literary editor does, the technical editor edits manuscripts for technical consistency and accuracy, by querying inconsistencies and implausibilities. Like the literary editor, the technical editor edits manuscripts for literary style, but with the added constraint of not changing the technical meaning or connotation."

Her "Twelve Basic Rules" of editing are a distillation of her many years in the field, and clearly based in practicality. The rules are organized in two sections: "Rules Governing Your Contract with Your Readers" and "Rules Governing Your Obligation with Your Employer".

And how about a chapter called "The 100 Most Common Errors" divided into categories like "fuzzy thinking"; "style and usage"; "technical accuracy"; "judgment, taste & sensitivity"? Sound useful? Another high point is the section on developing style guides, called "How to Write a Style Guide Writers Will Want to Use". It features such wisdom as "how to avoid revisiting the same decisions eternally".

If I have any complaint about Tarutz' book, it's the "Tips and Tricks of the Trade" section. You have to read the whole section cover-to-cover to get the best out of it, as it's a blur of topics ranging from the micro (how to choose a list type) to the macro (strategies for updating manuals).

This is a book that should be kept close at hand with your other reference books and turned to when you have a few minutes to expand your expertise in the field. Just be aware that it's a deep learning tool, not a quick reference.

Lois Marsh has been analyzing, writing and editing procedures for more than twenty years. She currently manages a team of analyst/writer/editors for BMO Financial Group in Toronto, Canada. She can be reached at lois.marsh@bmo.com.

Technical Editing—The Practical Guide for Editors and Writers, U$39.50

Publisher: Perseus Books, ISBN 0-201-56356-8

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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).

Email your proposal to lois.marsh@bmo.com including the title, author, price, and ISBN number.