



Issues in Project Management

When Good Projects Go Bad: How to Avoid & Resolve Problems

by Meryl Natchez

Despite years of experience, the best of intentions, strong talent, and a proven project methodology, sometimes projects just don't go well. I have been doing technical writing and training development projects for 18 years, and still face the occasional nightmare. This has lead me to reflect at length during sleepless nights on why projects fail, and what warning signs you can look for to avoid problems before they occur.

Why Projects Fail

In my experience, three root causes account for about 80% of project problems. These are:

- unclear expectations
- unrealistic expectations
- poor communication

The remaining problems are caused by a variety of factors including political, personnel, and product issues discussed later in this article.

Unclear Expectations

By far the most common reason problems arise is unclear expectations. Although clarifying expectations in writing can go a long way to resolving this issue, it's not completely foolproof.

Even when you start projects with a written proposal followed by a detailed documentation or training plan, words can have different meanings to different individuals. To take a very basic example: a tutorial to you may mean a book, and you describe it in terms of pages. On the other hand, your client (I use this term to mean either an internal client or manager or external client) may be thinking that tutorial means online, and that pages mean screens. You both assume your definitions are valid until the first deliverable—at which point you have a problem.

While this is an extreme example, there are many subtle variations on this theme. You need to constantly revisit and reaffirm

expectations to make sure you are on track. Delivering sample pages, templates, screen shots, or other interim samples of what the finished product will be reduces the chances of misunderstanding. Better to know after 20 pages (or screens!) than 200 that you're addressing the wrong audience or that the product has moved to a UNIX platform, but no one told you.

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Manager's Column

by Saul Carliner, SIG Manager

The Management SIG is among the most active in STC. Consider all that we do:

- Produce a newsletter 4 times a year
- Host Progression sessions at the Annual Conference (with approximately 15 to 20 presenters in each session)
- Operate a listserv, which sees traffic each week
- Host a website
- Sponsor an annual meeting at the Annual Conference

The only way we can be so active is through the efforts of volunteers. We are fortunate to have volunteers like Judy Herr, who manages our listserv and coordinates Progressions, Elizabeth Bailey who is our webmaster, Kat Nagel who is our membership manager, and Brenda Huettner, who publishes our newsletter. We are also fortunate to have members who contribute frequently to our newsletter and listserv.

Early April (a few weeks before our next newsletter is published) is National Volunteer Week in the United States. Although a bit early, I would like to use this column to thank our volunteers for their contributions to the SIG.

Although volunteering provides the SIG with many benefits, it also provides many personal benefits to the volunteer. Managing long-distance efforts is challenging and SIG leadership provides an opportunity to develop skills in this area. Volunteering provides great networking opportunities. Volunteering provides intrinsic rewards, too, such as appreciation that follows an article or posting that helped a manager address an immediate work problem.

In the coming months, some of these volunteers serving in leadership posts in the SIG will be completing their commitments. That provides you with opportunities to become more actively involved in the SIG. If you are interested in assuming a leadership position in the SIG, please contact me. I will be actively

recruiting new leaders during January and February through our listserv.

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Newsletter Deadlines

This newsletter invites writers to submit articles to be considered for publication. By submitting an article, you implicitly grant a license to this newsletter to run the article. Copyright is retained by the writer.

Fall Issue: September 15th

Winter Issue: December 15th

Spring Issue: March 15th

Summer Issue: June 15th

Book Review: Good to Great

Reviewed by Jennifer Square

"People are not your most important asset. The right people are."

Jim Collins, author of
Good to Great.

In *Good to Great*, the most recent book by Jim Collins (co-author of *Built to Last* and a former Stanford professor), the author explores what's needed to move a company from good to great. Collins's 5-year study focused on 11 companies that attained average cumulative stock returns of 6.9 times the general market in the 15 years following their transition from good to great. These companies—such as Abbott, Circuit City, Fannie Mae, Gillette, Kimberly-Clark, Kroger, Nucor, Phillip Morris, Pitney Bowes, Walgreens, and Wells Fargo—realized at some point that they're good, but not great.

So how did they work their way to great? Here are some highlights uncovered by Collins' research:

- Become a Level 5 leader. The leader in a great company builds greatness through a paradoxical blend of personal humility and professional will.
- Ask "First Who... Then What." Executives first got the right people on their teams before setting direction. By choosing the right people, they'll figure out where to take the organization. This concept is nothing new; what is new is the rigor needed to find the right people.
- Confront the brutal facts. Let the truth be heard. Understand

the difference between having your say and the opportunity to be heard. The book offers four basic practices to create a climate where the truth is heard.

- Create a culture of discipline. Build a culture around the idea of freedom and responsibility, within a framework. Fill that culture with self-disciplined people who are willing to go to extreme lengths to fulfill their responsibilities.
- Are you a hedgehog? Hedgehogs simplify a complex world into a single, organizing idea, a basic principle or concept that unifies and guides everything. They understand that the essence of profound insight is simplicity. Understand the hedgehog concept and the three circles.
 - What can you be the best in the world at?
 - What drives your economic engine?
 - What are you deeply passionate about?
- Use technology as an accelerator of momentum, not as a creator of it.
- Understand the Flywheel and the Doom Loop. Good-to-great transformations never happened in one fell swoop. They were cumulative, proceeding step-by-step. Good-to-great leaders spent essentially no time on "aligning," "motivating

the troops," or "managing change."

- Lead your work by questions: Does your work align with the three circles?
- Get involved in something that you care so much about that you want to make it the greatest it possibly can be, not because of what you will get, but just because it can be done. It doesn't have to be your business life.

After each chapter, the book offers a "Key Points" section for a handy reference, if you need to quickly read this book.

As you read this book, it's helpful to ask yourself how does this apply to me? Even though you may or may not be an executive at your company, you can still take away some good tips and insights from Collins' study. As Collins would suggest, start with questions:

- 1) How can you move from being a good manager to being a great manager?
- 2) How can your staff move from being a good documentation department to being a great documentation department?

Your answers may open a whole new realm of possibilities and change.

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Hot Topic: Help! I've Been Given the Training Department!

Edited by Peter Hartman

[Editor's note: This column provides a digest of a topic thread from the SIG listserv that deserves a more persistent form. Names and/or company references may have been omitted by request.]

Recently, Jolie Gallagher at Exabyte requested advice about her newly expanded job scope:

In a recent layoff/consolidation, my Technical Publications department has been given the task of training development. Our newly merged group will be responsible for manuals, WBTs, and CBTs ([but] not stand-up training).

Can anyone give me advice or recommend some books about how to develop effective training in CBT and WBT format, and how to make the leap from technical writing to instructional design?

Ann Rockley (The Rockley Group Inc.) wrote for many of us, saying: "I firmly believe that training and documentation should be in the same department. There are so many commonalities in what the two departments do." She also pointed to Bill Horton's book on e-learning and Web-based training and his Web site, www.horton.com.

Having worked in both training and documentation, as well as combined departments, and managed combined departments, I can heartily second Anne's thought. The synergies between the groups are myriad and the potential for

crossover learning is huge. After all, the primary goal of both groups is the same: to educate the users of our companies' products. In that sense, we are all teachers and the differences between our deliverables come down to format and media.

Robyn Clark (Galileo International) pointed out some of the benefits of the combined approach. "Our docs and training development have been under the same umbrella for many years.

"My writing group writes system reference doc, user training materials, procedural information and computer/web based training programs, as well as operational information that we provide to external customers. The training group determines how the systems will impact the users, procedures and training presentations, we include those impacts in our materials, then they train it.

"My writing group carries instructional design skills, as well

"It's been great because the online help, docs, and training materials have the same consistent message."

We had teams both here and in the U.K. It's been great because the online help, docs, and training materials have the same consistent message. Best practices are developed, then propagated through all of the deliverables."

Michelle Moore (Transamerica) described how her combined department works:

"My department, Information Development, is responsible for the organization's user documentation (internal and external). I manage the writing group, I have a peer that manages Operational Development (the training group) and the Director of Organizational Learning manages the two of us.

as those needed for development of documentation and web materials. The only thing they don't do is present the information to the audience."

Robyn Clark also noted that one of the keys to making a combined group work is the use of a common development scheme. "We have found that everyone must develop under one system or the sharing of information doesn't flow well." In her case, they used Information Mapping techniques to develop department standards that everyone can follow. "We created a number of style sheets that incorporate both our standards and basic Info Mapping concepts, and everyone is required to use them."

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10 Rules for Bad Development Management

by John Hedtke

There are advantages to being a bad development manager. For one thing, you don't stand out from the crowd: most development managers are pretty bad. For another thing, bad development managers have a knack for getting promoted in the face of all evidence to the contrary. With mediocrity the norm, bad development managers have an edge: nobody expects much of them. Perhaps best of all, bad development managers don't have to do a lot of original thinking.

This article identifies the ten most common things that bad development managers know in their bones. If you follow all ten of these rules, you'll be able to hold your head up as the baddest of the bad.

1. Don't spec anything!

Specs are for wimps! A real development manager knows how to code from a complete system document written on the back of a cocktail napkin. Besides which, specs only mean that you'd have to waste valuable coding time writing words, and that's not what they hired you for, is it?

2. Never admit you don't know something.

Even if your ignorance is flying a flag, don't admit you don't know anything about the subject. If necessary, dismiss the idea as irrelevant ("I evaluated that and decided it wouldn't work here. I made an executive decision and

saved my staff the time.") Don't join technical organizations, either; they'll just highlight where you aren't up to speed on a technical subject.

3. Don't inform your staff of innovations or tricks you know.

As a corollary, your staff needs to be kept in the dark. You don't want them showing you up; besides, it's their job to come up with things on their own. And never encourage them to read magazine articles or books. If they ask you if you've seen something, merely say "I read that article a year ago" in lofty tones.

4. Plan your project by gut instinct.

Although closely tied to rule #1, this rule's a little different. You may not have a spec, but there might be a de facto consensus as to what you're generally trying to

accomplish. However, real development managers know that there's no way to predict how long a development cycle will take, so you can't possibly schedule anything. Including release dates.

5. Don't review code.

Reviewing code would make you responsible for other people's mistakes, and you'd never want to be held accountable for that.

Instead, assume that everyone is coding well, tests their own code, and knows what they're up to.

6. Don't have a test plan.

If you had a test plan, someone would hold you to it and you'd be accountable, once again. Let the tech support geeks deal with testing in their free time. It's good OJT for the product. If they've all been laid off because of a late product release, let your beta sites and customers do the testing for you. Everyone knows that software has bugs: that's what .01 releases are for!

7. Don't make time for support.

Tech support will want to know what's being done in the new product so they can be up to speed when the product comes out. Keep them in the dark as long as you can (even up to the date it's released to the customers if possi-

"If you follow all ten of these rules, you'll be able to hold your head up as the baddest of the bad."

ble!) because they'll only ask embarrassing questions. Even if they don't, they're going to drag your people away from essential tasks like coding, and you already need everyone working as hard and fast as they can.

8. Don't make time for documentation, either.

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Documentation is a non-essential task that is simply not the concern of a good development manager. (It's only typing, after all.) The technical writers should be able to read the code and figure out everything they need to know. Similarly, you should never, ever give Marketing the most recent version for press releases. Let them take pictures and demonstrate the stuff that's been tested and you absolutely know is going to work, even if you've decided not to use it.

9. Ignore turnover issues.

There will always be some malcontents who can't see the vision as clearly and leave before finishing their commitment to the project. (Crybabies.) Explain to the remaining staff members that

your expertise as well? They'll be sure to appreciate it, particularly if you have recommendations on who to promote or fire. Moreover, since they'll have to deliver your message when the layoffs come, you'll be able to keep your skirts clean.

Scoring:

- If you scored 1-3, tough luck! You're probably never going to be a bad development manager.
- If you scored 4-7, you're well on the road to a stunning career in development management and will be recognized by your peers for what you are.
- If you scored 8-10, your future is assured: you're going to be talked about with awe and wonder for years to come.

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She also pointed out the opportunities that a combined department can offer to staff seeking to expand their skill sets. "My team's primary responsibility is to produce online Help and all docs. But within our blended department, they have had the opportunity to learn training development. One of my people has shown a real knack for it [and] two of the training developers have asked to learn RoboHelp."

Finally, Robyn reminded us that learning can happen throughout the organization: "As a management team, we've found it's better for us to be flexible and encourage development of talents that we can all share."

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"The last rule is to stick your oar in wherever you can, whether you've been invited or not."

whoever left "wasn't that good anyway." And feel free to add programmers whenever the project is running late. Fred Brooks wrote "The Mythical Man-Month" 25 years ago about mainframe development in the early 60s, not about what you're doing.

10. Interfere with other managers' departments.

The last rule is to stick your oar in wherever you can, whether you've been invited or not. Once you've got your people working to capacity, you should have a fair amount of time on your hands, so why not let other managers benefit from

Note: No one person was maligned for this article; rather, this is a summary of many different bad development managers (most of whom worked at companies that are now, oddly enough, out of business). However, if you're reading this and the shoe fits....

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To remove your name from the Management SIG listserv, send a blank email to:

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Note that the character after the second hyphen is a lower-case L.

Unrealistic Expectations

Even if expectations are clear, they may be unrealistic. Usually unrealistic expectations focus on deadlines or cost. When confronted with an unrealistic deadline or cost, my recommendation is to negotiate what you believe you realistically can accomplish within those parameters. Too often, we want to say yes, committing both ourselves and the client to a frustrating relationship in which the poor writer works days, nights, and weekends to deliver something that doesn't satisfy the client. This is a classic lose/lose situation. Many of us wind up here—I know I did for years—because we don't want to say no, don't feel we can say no, or don't know how to negotiate.

If you find yourself in this kind of relationship to your work, I suggest you make it a policy to say “let me get back to you with a proposal” or “give me until Friday to come up with an approach I think will work.” Use whatever words feel comfortable to you to buy some time to evaluate what you can realistically deliver. It helps to know what the client's top priorities are, so that you can come up with a plan that satisfies these. For example, if you are a single individual, and your client (or boss) has requested a user's guide, an online tour and a reference manual developed in the next six weeks, it helps to ask the question: “If you could only have one, what is most important to you?” Or: “Can we combine the refer-

ence and the tutorial into a getting started guide that covers installation, key features, and frequently asked questions and follow this with a more detailed set later?” The way to phrase this is, “You know, we can't deliver the quality I know you expect from us on all of these deliverables in this period of time, so let's focus in on doing an excellent job on (selection goes here).”

“When confronted with an unrealistic deadline or cost, my recommendation is to negotiate what you believe you realistically can accomplish within those parameters.”

In some departments, everything is driven by budget. There is only X amount of money available, so you need to find the best solution you can derive within that budget. In others, release date is key. Negotiate from the perspective of achieving the best possible quality given the tight time frame or available budget.

Poor Communication

Once you're working from a clear set of realistic expectations, the next monster to rear its head is poor communication. One way to avoid this is to determine at the beginning of the project how much, when, and how you are going to stay in touch. Weekly emails, status reporting, phone conferences, onsite meetings, whatever methods work for you and your client—establish them up front, and stick to them. As the project progresses, are you getting the information you need? Is management supporting the project? Are key players contrib-

uting feedback? Are developers reviewing your drafts? If things change, are you informed? If not, you have a communication issue.

Personnel and Product Changes

A few additional things to watch for include hidden agendas, warning vested interests and personnel and product changes.

These can sabotage your project, too. Of the above, personnel and product changes are simply a fact of life. Stability is a rare commodity in general in technical communication. Allowing for product changes in your plan and quantifying what changes will mean in terms of time, budget and quality helps keep expectations realistic. My usual estimate is that last minute changes, or date slippage has a one-to-three impact on schedule. For example, if the client is one day late in a scheduled review, this has a three-day impact on the documentation schedule. If 20% of the interface screens change, this requires 60% more research and writing time. If these estimates seem excessive to you, what can I say? In many cases, the impact is tiny, but in others, one change on one screen may affect dozens of pages and textual references that have to be searched, replaced, checked, and

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reformatted. As part of the ongoing education process, a one-to-three estimate is an excellent rule of thumb.

Hidden Agendas— Politics

More difficult to combat is the dreaded hidden agenda. For whatever reason, the story you're being told, the proposal you've signed, or the orders you're marching to have nothing to do with (and may be exactly contrary to) the manager's true agenda. This tends to occur when an engineering manager, for example, is grudgingly forced to manage documentation development, or when upper management has no support for the project. In these cases, you become a handy scapegoat on the field of political battle. Technical communicators often fall into this trap. Technical communicators tend to avoid political entanglements and focus on research and writing. However, awareness of the political currents is essential to success, whether you are an outside consultant or an employee.

Here are a few warning signs that you may be in the middle of a political battle:

- Conflicting directions from different individuals
- Directions that change from day to day
- Lack of information
- Rampant misunderstanding

At the recent STC Region 8 Conference, when this slide appeared, someone raised their hand and

said, "That looks like my job description!" Unfortunately, this is too often the case. If you're operating in this type of environment, you need to be sure to take the initiative and be a true communicator. Keep records of agreements—by confirming via email or memo, and being as exact as possible. Keep a paper trail of changes, review, comments, requests, so that when someone asks why, you can show them. Even more important, you need to continuously clarify expectations, both in meetings and in writing. And if you're receiving conflicting directions, schedule an in person or phone conference with both (or all) managers involved and don't proceed until you have a clear, documented directive.

Submit frequent samples and

today. If I don't hear from you, I will assume acceptance of <our direction, the document, the format—whatever it is they're reviewing>. Changes after today will have and impact both on the budget and delivery date." The style and wording of the note can be more or less formal, but needs to clearly let them know the effect of "no comment" on the project.

Of course, more important than any system for demonstrating that you did what you were told, is being an active part of the team. Exercising your interpersonal skills ensures that your needs are considered, and the impact on your part of the project is clear. Remember, YOU are the perfect scapegoat—especially if you're an outsider. For every project, you'll find some people sincerely want to be part of the solution, and

“Technical communicators tend to avoid political entanglements and focus on research and writing. However, awareness of the political currents is essential to success, whether you are an outside consultant or an employee.”

attach a signoff sheet (either paper or electronic). The signoff sheet should include relevant information about the deliverable, what needs to be reviewed, what type of comments you expect, and when you need them by. It should clearly state that lack of response signifies acceptance of the sample/deliverable. When the date you need the comments comes without a response, follow up with a note that says something like: "Just wanted to remind you that any comments on X are due

others don't. Be sure to partner with key resources. These may not be your assigned contacts, or even directly a part of your group or team. However, identifying subject matter experts, managers, and administrators to provide ongoing access to information you need can be the difference between success and failure for your project. Creating a "virtual team" like this is rewarding not just for you, but for them. As you

develop meaningful solutions, you make life easier for everyone on the team.

Don't overuse these resources or ask for more than they can give. Instead ally yourself with them to make progress. Thank them for what they do, be as helpful to them as you can, and don't waste their time! A little appreciation goes a long way.

I've already talked about warning signs that let you know you may be struggling in a political morass. For reference, I've included a bulleted list of things to watch for to alert you that your project may be suffering from one of the "top three problems" discussed above:

What You Can Do to Avoid Problems

Once you've detected one or more of these signs, what can you do to keep your project on track? The key in this process is to recognize your strengths and weaknesses. Do what you do best, and delegate the rest. If you aren't detail oriented, make sure you team with someone who is. If you are the lone writer who has to do everything, try to select projects that rely on your strengths to succeed, and say no to ones that require skills you don't have. In fact, knowing when and how to say no is as important to success and delivering quality work on time. Many employees feel that "no" is not an option. Yet when faced with unrealistic expectations, for example, you can't agree and succeed. You need to learn how to insist on clearly defined goals that you can meet. This is an article in

itself. But for now, pick your battles—insist on what's critical, and management's respect will grow, not diminish. Always focus the discussion in terms of your wanting to help them achieve success. With this objective in mind, determine what's possible.

It's also important to implement a "no surprises" strategy. Your management needs to know as soon as possible if you're not going to be able to meet a date, or deliver as promised, so that they can adjust. For this reason, it's also wise to follow this maxim: under promise, over deliver. This simply means if you think you can have it done by Wednesday, set Friday as the due date. If you deliver early, great. Never promise more than you think you can do. Being able to rely on your predictions is key to your being a trusted player.

Finally, share responsibility for decisions—especially in a political environment. Discuss options, and agree on a strategy as a team. Then document any verbal agreements. If you have buy-in to the project direction up front, it's much easier to deal with problems that may occur down the line.

When Problems Occur

But of course, problems do occur from time to time. In some ways, effective communication consists of solving a series of problems. It's part of the challenge and reward of what we do. If you're paying attention to the warning signs, you can be proactive, and confront problems early as opposed to waiting. This is coun-

terintuitive, as most of us want to avoid problems, and put off confrontations. However, problems left unattended just grow worse. As soon as you get that little niggling feeling in the back of your mind or pit of your stomach that something is wrong, deal with it.

As you deal with the issue, avoid the temptation to be right at all costs. It's morally thrilling to be right, but strategically it won't do you much good. Keep a paper trail to show that you have been proceeding down an agreed-upon path, but when trouble hits, accept it as a problem that you need to help solve, not a challenge to your integrity. I'm reminded of a nautical jingle:

Here's to Charlie who died today.
He died defending his right of way.

He was right, dead right as he sailed along.

But he's just as dead as if he were wrong.

Or in the words of the great Satchel Paige, "Never complain, never explain." In a profession whose members can sustain a passionate argument for hours over the placement of a comma, this reminder is particularly salient.

Try to put yourself in the role of looking at what is best for the project, letting go of your specific point of view. Make an effort to understand the problem as the client sees it, or as their manager might see it. If you have to make scathing and sarcastic remarks about the stupidity or cupidity of others, do so to yourself in private. On a recent project, I wrote

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a detailed email to myself blasting the project team, and then felt perfectly capable of dealing calmly with the problem. Offer alternatives to help solve the problem, and focus on how you can make this work as well as possible for everyone involved. Not only will this approach yield results, it will help build long-term relationships as clients realize you are on their side, and working to make them successful. In the process, you become successful yourself.

I'd love to hear your thoughts and experiences on these topics. Send mail to me at meryl@techprose.com.

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Project Warning Signs

Unclear Expectations

Absence of written or verbal validation
Memos or comments that don't make sense
Project plan seems to be changing
No signoff on deliverables
"Every day a new agenda!"

Poor Communication

Unreturned email or phone calls
Meetings skipped or routinely rescheduled
No review or feedback on deliverables
Finding out things from second-hand sources

Unrealistic Expectations

Impossible schedule or budget
Refusal to acknowledge problems
Reiteration of goals and objectives
"We don't have time for you."



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