

## Topics in Policies & Procedures Progression Session

**Session Info: WE 7B - Tuesday, May 9, 2006 - 2:00 – 3:00 pm – Vendome A/B Paris**

**Moderator: Dawnell Claessen**

The Policies and Procedures (P & P) Special Interest Group (SIG) has organized a lineup of speakers who will present a variety of topics all directly related to the P&P Community of Practice. These topics include career assessment, process development and management, life cycle development and adaptation, the role that charm plays, soliciting input from a user community to aid in the development of new materials, building online manuals, restructuring manuals to achieve a common look and feel, as well as content management systems.

<b>Table</b>	<b>Topic</b>	<b>Presenter</b>	<b>Bio</b>	<b>Topic Abstract / Info</b>
MOD	Moderator	Dawnell K. Claessen	Dawnell Claessen is a Technical Writer and Policy Analyst with more than 20 years experience developing regulatory affairs documentation for software and systems developed and operated in a secure or highly regulated environment. Dawnell has a Master's Degree in Federal Information Policy from the University of Texas at Austin.	Progression Session Moderator
1	Adapting your document development life cycle to your P&P Process	Michele Anderson	Michelle Anderson is Director of Policies and Procedures for Encore Credit Corp., a wholesale mortgage REIT, headquartered in Irvine, CA. She has managed policies and procedures departments in the financial industry for over 10 years, including Downey Savings and Loan, Argent Mortgage, and IndyMac Bank. Michelle has taught technical writing classes for the technical writing certification program for Cal State University, Dominguez Hills, and is a former editor of the P&P SIG's publication "Direction" (formerly known as "Steps and Specs").	Policies should not be developed in a vacuum. Policy documentation (as well as IT documentation, training documentation and other writing projects, for that matter) should follow the Document Development Life Cycle (DDLCC). The phases of the DDLCC should be adapted to fit the policy development and approval process, which has a direct impact on your organizations' place along the Information Process Maturity Model (IPMM).
2	The Power of Charm	Helena Bouchez	Helena Bouchez is a seasoned technology	Policy development is different from

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	in P&P		<p>and writing professional with nearly fifteen years of experience in business, project management, research, information technology, and technical writing. She is a business-savvy technical writer with unique ability comprehend and translate complex technical information, knowledge, and best practices to easily understood language. Her clients include Hewitt Associates, Inc., the American Marketing Association, Banco Popular, and Hodge Communications, Inc. and her networking and job-related articles appear on websites and in the recently published e-book "Network-a-holics." She brings a holistic approach to every project, combining logic and creativity to move businesses forward.</p>	<p>procedure development in that it is not necessarily a linear process. Multiple groups of people from several different disciplines may need to agree on the content. Everyone will have their own Opinion on what it should cover -- if they even respond. Policies are usually dead last on someone's list of priorities. Add to that, no one really wants to make up rules -- because then they will be expected to follow them! The ability to complete policies in a timely manner goes far beyond one's writing ability. It's about Convincing all involved the policy is important and then charming everyone who needs to be involved into feeling good about giving you what you need. This presentation will outline specific strategies and techniques that can move any project forward.</p>
3	Restructuring P&P Manuals to a common look and feel	Melanie Coates	<p>Melanie Coates has been employed with the RCMP for 32 years with 20 years' experience in writing and editing policies and procedures. She has an Honours Certificate in Public Relations. She also has extensive experience creating and delivering training programs on policy and procedural writing and management techniques.</p>	<p>The Royal Canadian Mounted Police (RCMP) has a massive amount of policies and procedures manuals (operational, administration and 16 subsidiary manuals) which need to be restructured to conform to the Government of Canada Intranet Common Look and Feel Standards and Guidelines for Intranets.</p> <p><b>Outline of Presentation:</b></p> <ul style="list-style-type: none"> <li>-existing framed html documents</li> <li>-existing and proposed table of contents</li> <li>-template development (layout and navigation)</li> <li>-minimalist writing style (playscript)</li> </ul>

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				<ul style="list-style-type: none"> <li>-existing and proposed numbering system</li> <li>-governance and management of information (simplicity of publication)</li> <li>-lessons learned</li> <li>-future strategy</li> </ul>
4	SharePoint Technology & Tools	Frank Cook	Frank Cook is the Manager of Technical Publications for The Shaw Group	This topic is about SharePoint Technology tools Frank and his colleague Sharon Lynn created to support a Navy Public Works Contract where they were writing or revising out-of-date policies and procedures for the Navy. These tools and technology utilize a popular content management system and assist in guaranteeing that everything from requirements for style and format to deadlines and review schedules are met. The procedures must meet all state and federal guidelines.
5	Nimble P & P	Adrienne Escoe	<p>Dr. Adrienne Escoe is the architect of documentation systems that use innovative and powerful techniques to incorporate zero-based, zero-defect strategies, resulting in reduced volume, cost, and processing time. As an acclaimed author and speaker, Adrienne shares her ideas with a variety of audiences, including technical writing professionals.</p> <p>Dr. Escoe is on the Advisory Board of the Technical Writing Certificate Program at California State University, Fullerton, is VP of Membership for the Orange County (CA) Chapter of STC, and was co-chair of the 2003 Southern California Technical Communication Competition.</p>	Explore and apply Nimble Documentation ®, an innovative and powerful approach that incorporates zero-based, zero-defect strategies to reduce volume, cost, and processing time for your company's policies and procedures.
6	Developing an	Wayne Glover	Wayne Glover is a senior P&P Analyst at	The proposed Advanced Procedure Writing

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	Advanced Procedure Writing Process		Technical Media in Redmond, WA	Process (APWP) vastly exceeds current procedure-writing methods because it integrates Requirements definition, metrics, human factors, FMEA process, procedure understanding testing, informational design, and technology (via a Content Management System), into an effective package. The result of using this advanced process is an integrated set of procedures that form the framework of an effective and error-tolerant organization.
7	Controlling and Centralizing P&P in a Web Environment	Ralph Jenks	Ralph Jenks is the Director of the Office of Procedures, Records, and Forms at Washington State University	This session provides answers to those in your organization who want to independently publish policies and procedures on departmental websites. I explain why this is a bad idea from legal, audit, and functional perspectives and provide justification for a visible central location for all organization policies and procedures. Finally, I provide a plan and simple steps for gaining control of organization-wide policies and procedures. I will provide suggestions regarding appropriate administrative materials for publication on departmental websites. Outline: Introduction of the topic and the problem Legal/audit issues Functional issues Plan for gaining control Suggestions for departmental publication Summary Interactive discussion
8	SharePoint	Sharon Lynn	Sharon Lynn is a Technical Editor for The	This topic is about SharePoint Technology

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	Technology & Tools		Shaw Group.	tools Sharon and her colleague Frank Cook created to support a Navy Public Works Contract where they were writing or revising out-of-date policies and procedures for the Navy. These tools and technology utilize a popular content management system and assist in guaranteeing that everything from requirements for style and format to deadlines and review schedules are met. The procedures must meet all state and federal guidelines.
9	Process Mapping in P&P Documentation Projects	Lois Marsh	Lois Marsh has worked as a procedures specialist, technical editor and business analyst in regulated service industries since 1987. As a member of Ernst & Young's Management Consulting practice (now Cap Gemini), she spent seven years monitoring and analyzing the operations of the Canadian Post Office. She has supported the reengineering of processes in diverse service industries from retail catalogue operations to securities trading. Currently, Lois manages a documentation team for BMO Financial Group's Market Risk team and is editor of the P&P SIG newsletter, "Direction".	Outline of topic: What is process mapping and why should we use it for P&P documentation projects? How does process mapping help define the scope for your documentation project? Swim lanes explained. Who's driving the ship? Determining roles at the outset of the project. Deciding how "high level" to go. What's the right amount of detail to include?

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10	Reality Check: Soliciting Input to ensure that P&P are communicated effectively.	Libby Mazur	Libby Mazur works at Southwest Airlines, in the Ground Operations Training Department. Over the last four years her job has evolved into that of department editor. As a result, Southwest has made great strides in the quality and consistency of our communication to employees who work at our 61 airports. Southwest has made it a priority to ensure that all operating departments communicate with each other so that the message we send to the various workgroups is consistent.	When communicating to employees in the field, it is important to understand the “real world” of how policies and procedures will actually be put into effect. The best way to ensure that we are communicating clearly and effectively is to solicit input from the very folks who must follow these policies and procedures in the course of their workday. The Southwest Airlines Ground Operations Training Department includes a group of supervisors (called the Reality Check Team) in the review process prior to communicating critical information to the field. Examples will be given of how this forum has contributed to the change process.
11	Building an online corporate policy manual	Neal A. McDonald (Lex)	Neal “Lex” McDonald is the Administrator, Corporate Policy for SCANA Corp. He has held this position for a year with the task of revitalizing Corporate Policy management. Lex has 15 years experience in Human Resources and Organizational Development, including acting as manager of HR operations for three states with a staff of 13 HR professionals. Prior to his work in HR, he was an ordained pastor in the United Methodist Church. His education includes a bachelor’s in English from the University of South Carolina, Master of Divinity degree from Emory University and a Master’s in Organizational Development from American University (co-sponsored by NTL).He currently serves on the Special Expertise Panel for	Our task was to revive the central management of corporate policies, which first required establishing a process to develop and manage policies. This discussion will focus primarily on that process, which included establishing guidelines, senior management sponsorship, a review committee, identifying subject matter experts to write policies, and how policy topics were selected. I will also discuss our decision to forego publishing a manual and placing the library online, using the software RoboHelp. I would provide a working demonstration of our policy library which was launched August 2005, now containing 18 corporate policies, with more in the works.

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			Ethics for National SHRM (Society for Human Resource Management.)	
12	Assessing your Career in P&P	Raymond Urgo	Raymond E. Urgo is the founder and principal of Urgo & Associates. He is a recognized leader in policies and procedures documentation. His 25 years of experience in this specialty include writer, analyst, project manager, supervisor, recruiter, mentor, instructor, educator, researcher, author, speaker, publications judge, and consultant. He serves on boards and committees of professional associations concerned with technical communication, organizational development, and consulting.	How balanced are your talents for a career in policies and procedures? In this progression round, attendees will engage in three exercises to quickly assess their talents, discover their values, and plan action for becoming more balanced in their P&P careers and lives. Attendees will have an assessment tool which can be reapplied afterwards.
13	Going Electronic	Chris Williams	Chris Williams is a Technical Communicator at Idaho Central Credit Union.	Idaho Central Credit Union employs approximately 160 people, each equipped with a computer connected to the company intranet. Two years ago we took our policies and procedures from paper copy to html and added a search engine. Due to growth, and other circumstances we have looked for specific software – a knowledge base, which would allow us to do a better job of organizing, updating, and searching our policies and procedures.  This session will focus on the circumstances, process, and results of our search for a knowledge base for our policies and procedures. We have just gone through the process of selecting the software and are now transferring the files into the new database.