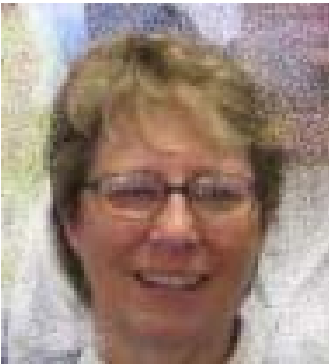


## Manager's Report: Giving & Getting to/from Your SIG

By Lois Marsh, SIG Co-Manager



OK, I'll admit it...sometimes volunteering for our SIG is a tough slog.

There are times when I resent those precious hours I have to carve out of my holiday preparations — to help get the newsletter out, or to welcome the latest new members to our virtual community.

Then I remind myself how great it feels to be able to share experi-

ences with my peers — people with many years in our field, or those who are just getting started who often have a fresh view on old problems. Volunteering brings me especially close to many of them.

I'd like to convince some of you to jump in and volunteer, too. On page 6 of this issue, you'll see a number of volunteer opportunities.

Or if you'd like to just "dip your toe" into volunteering, there are lots of finite tasks or small projects that need doing and don't require a big commitment. Here are some of the reasons you should go for it:

### Five good reasons to volunteer for your SIG...

1. Develop a stronger peer network. Society volunteers form a special and highly visible group in their field
2. Tune into trends and new ideas within the profession
3. Influence the activities of your SIG
4. Volunteer participation in professional societies is perhaps the most tangible evidence of commitment to your profession
5. It's personally rewarding. Many of us have developed close friendships with other volunteers

### Getting the best from your SIG...

During our October SIG conference call, we discussed what services are the most valuable to members. The following is a summary of your responses:

- **Industry news and trends.** What is happening and what are

the latest developments affecting our work?

- **Tips and tricks** for our area of practice (could be related to technology utilized, problem situations encountered or just something as simple as "this worked for me in this situation").
- **Networking and peer interaction**

Everyone agreed that "meaty" discussions on the listserv were something on which they placed a significant value.

Moderated or purposely posed questions or topics to stimulate discussion were suggested.

We have attempted this in the past with limited success, but we can certainly try it again. Perhaps rewards for the most stimulating post each quarter might do the trick!

A teleconference style presentation of topics was also suggested. These should be low tech, cheap or free to attendees and cover targeted subject matter. Dawnell suggested that progression session topics presented at the conference might be adapted to fit this format. Our SIG has a budget for teleconferencing lines, and other SIGs have done this.

### Wishing you a fabulous holiday season...

Whether you celebrate Christmas, Hanukkah, Diwali, Eid or one of the many other winter celebrations around the world, Dawnell and I would like to wish everyone a happy and safe holiday season, and a prosperous new year.

And if you're in Australia or other points south, have fun on the beach!

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## Policies, Processes and Procedures: Governing Standards and Information Architecture

By Cherie Fairburn

### What's Driving Policy Proliferation?

The purpose of policies is to provide management guidance for day-to-day operations. Policies can be thought of as a mechanism through which to implement an enterprise's published mission statement. For example, one driver of policies is the desire to implement identified business, social, charitable, and educational goals and objectives. A second driver is a perceived gap in business objectives or in business processes. Policies that develop in either way are internally driven.

Of greater concern are the forces from without prompting the emergence of new policies from a third direction. For the sake of convenience, I'll refer to this category of policy development as externally driven. An implacable truth of our times is that government regulation is a growth industry. The inevitable result is control of numerous industries and even business practices that were formerly unregulated. Creeping government regulation thus drives policy growth exponentially—both on a national and on an international scale.

Closely related to government is governance, a fourth driver of policy proliferation. A host of national and international standards organizations, industrial councils, NGOs, professional associations (AIA, ABA, AICPA, ACORD), and watchdog groups promulgate governing standards and measurements unique to their particular industries or professional areas of interest.

A fifth driver of policy proliferation is the growing recognition in all industries and professions of the need for objective measurement of outcomes. In the absence of:

- 1) formal, stated objectives in the form of a **Policy** statement,
- 2) augmentation by an identified **Process** description specifying parameters and standards of measurement to evaluate outcomes in relation to known Policy objectives, and
- 3) A **Procedure** summary documenting each component of a given job in chronological sequence of task performance, the ability of management to assess business goals achievement must necessarily remain elusive and subjective.

Contemporary business practice has come to recognize the important contribution of W. Edwards Deming to the field of Process Management. Father of Total Quality Management, Deming exported his theories and processes to the Japanese people to help rebuild their industries following World War II. So pervasive are these practices today that, indeed, scientific business process management is now the norm.

### Governing Standards, Regulations & Benchmarks

Whatever the driver, policy proliferation is here to stay as one strategem in the risk management initiative. Following are five

examples representing the kinds of government regulations and governance standards that result in the institution of policies: HIPAA, ISO 9000, COBIT, SAS 70, and SOX (Sarbanes-Oxley).

The above listing is only a drop in the proverbial bucket as compared to the hundreds, perhaps thousands of international, national, state, and nongovernmental regulatory standards and compliance benchmarks now in existence.

### Policies & Procedures

The nature of Policies & Procedures is often misconstrued. Because these documentation items are referred to in one breath, the general assumption is that they are a single document, inseparable in the same way one might conceive of "peanut butter and jelly" as a single unit. In fact, they are separate communications and serve separate purposes. Equally important, they are hierarchical in nature. A Policy + Process + Procedure documentation suite accurately reflects the correct conceptual framework as follows:

Hierarchy	Purpose	Primary Characteristics
Policy	Controlling authority for <b>Who</b> executes certain work to be performed	<p><b>Static in nature</b></p> <ul style="list-style-type: none"> <li>• Implements a desired business objective</li> </ul>
Process	Operational guidelines for <b>What</b> to do	<p><b>More dynamic than Policy statements</b></p> <ul style="list-style-type: none"> <li>• Establishes work parameters + rules</li> <li>• Identifies metrics</li> <li>• Specifies entrance/exit criteria</li> </ul>
Procedure	Specific directions for <b>How</b> to do it	<p><b>Most dynamic/subject to change</b></p> <ul style="list-style-type: none"> <li>• Describes each component of the work in sequential order</li> <li>• Responds as needed to continual process improvement forces</li> </ul>

Continued on next page...

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My personal conceptualization of enterprise documentation as an integrated system prompted me to reformulate and restructure our P&Ps to reflect that interrelationship and structural hierarchy.

The result is the creation of an integrated series of document suites. It reflects a cutting-edge, systematic approach to documentation, and one that is attracting the attention of other professionals, including the National Accounts Division of Policy Tech International.

Policy Tech, the developers of our Policy & Procedure Manager software application, are now recommending the BCBSLA con-

cept, taxonomy, and integrated approach to other BCBS licensees who purchase the application."

**Editor's Note:**

*This article was originally developed for Blue Cross Blue Shield. Look for Cherie Fairburn's article to continue in the next edition of **Direction** with a discussion on the application of P&Ps in a specific context, illustrated with templates that can serve as a model for other professionals who want to begin exploring the idea of integrated document systems.*

*To learn about the author, see Cherie's profile on page 4 of this issue. You can contact her at [Cherie.Fairburn@bcbsla.com](mailto:Cherie.Fairburn@bcbsla.com).*

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## Career Corner: Tips for a Successful Technical Communications Job Interview

*By Adrienne Escoe, Escoe Bliss Communication, Inc.*

You may have had dozens of job interviews in your life, or maybe you're just starting out in your career, or job-hunting for the first time in years.

Whatever your situation, it's important to your job chances to keep up to date with current employer expectations for interviews, especially in a field such as ours.

Here are my top ten tips for a successful job interview in the technical communications field:

**Submit a flawless résumé and work samples:**

1. Use correct and consistent spelling; hyphenation; capitalization; space between sentences; comma before last word in a series; size of dashes and spaces (if any) before and after; oblique (slash) and spaces (if any) before and after
2. Ensure your document's **Properties** summary describes your document (not another) and has your name (not your previous company or another author)
3. Have work samples available in digital format (no hard copy that recruiters will have to scan)

**Present a positive image at the interview:**

1. Dress professionally (one step up from what the job requires)
2. Show energy and maintain eye contact (don't look at your feet!)
3. Don't do all the talking; listen!
4. Ask questions. When you ask a question, you demonstrate interest in the job. A good question is: "What would be the greatest challenge for someone filling this position?" A bad question? "Would I be working in a cubicle?"
5. Don't burn bridges by bad-mouthing a current or former employer — the tech writing community is small, and recruiting companies talk!

**Other important tips:**

1. Keep in touch — even if you don't get the job, check back in future in case another opportunity opens up
2. Update your skills: if your toolkit consists only of Microsoft Word, learn other software

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*Dr. Adrienne Escoe is President of Escoe Bliss Communication, Inc. located in Irvine, California. Adrienne's experience includes human resources, personnel training, documentation, quality assurance, plant services, and administration management at one of the world's largest companies; senior editor at a national educational research and development laboratory, and university teaching.*

*She earned a doctoral degree at the University of Maryland, master's degrees at Loyola College in Baltimore, and a bachelor's degree cum laude at The City College of New York. Adrienne is the author of "The Practical Guide to World-Class Documentation" and many other publications, and is a nationally recognized speaker and facilitator.*

*For information about her company, see <http://www.escoebliss.com/>.*

## New Member Profile: Cherie Fairburn



**Direction:** Can you briefly describe your business background?

**Cherie:** Law (5 years); Government Contract Management (5 years); Technical Communications (20 years); Education & Training (5 years)

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

**Cherie:** I am the lone technical communicator for Blue Cross Blue Shield in my area, a large company with a staff of some 3,500. I myself need a staff of at least three to accomplish all the work that needs to get done. Sometimes I picture myself as the "widdle kid" with her fingers in the dyke. It's a fabulous job for anyone looking for job security! I also teach communications (composition, speech) and literature for University of Phoenix, Baton Rouge Main Campus.

**Direction:** Tell us about your audience.

**Cherie:** I support all IT functions, e.g., developers & managers, QA (policies, processes, procedures, operating instructions; training materials); IT recruits (recruiting materials), and special projects requiring communications expertise.

**Direction:** What do you like most about your job?

**Cherie:** That's easy: the autonomy! Wherever the need exists, from document design, control & management to policy development, to taxonomic frameworks & information architecture, to cultivating the corporate collective voice, I am able to propose solutions that are not only solicited, but implemented. I truly appreciate knowing I am a valued contributor to this enterprise. This would not be a suitable position, however, for anyone who is not a self-starter.

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

**Cherie:** 1) Trim the fat, 2) streamline the visual presentation, 3) use section headings liberally, and 4) when using government/military style number outlines, never go deeper than level 3—only a few users/readers can retain strings of numbers in their heads. The limitations of short-term memory constrain the rest of us ordinary mortals. My solution in this case is to begin alphanumeric numbering below level 3. For example, we might begin with 3.2.2:

3.2.2 Heading

3.2.3 Heading

(Begin with text, more text, etc. ...

text, text, text ... to include the following deliverables:

1. Document A
2. Document B
3. Checklist A, to include the following attachments:
  - a. Attachment A
  - b. Attachment B

You get the idea.

**Direction:** What's the biggest P&P challenge that you face in your current environment?

**Cherie:** The perception of many that this is "just some dumb thing I gotta do." They often don't realize that well-crafted P&Ps can simplify their overall process immeasurably.

**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.

**Cherie:** As a divorced mother of four (all grown) living in Baton Rouge, LA, I am free at this point in my life to "feed my head" as I pursue my personal avocation of developing a Grand Unified Theory of the Way Things Are, which stemmed from my particular interest in the Esoteric Tradition in the Western Canon. Alas, it's a lonely pursuit. Nobody else ever wants to hear about my discoveries!

You can contact Cherie at [Cherie.Fairburn@bcbsla.com](mailto:Cherie.Fairburn@bcbsla.com). Don't miss her articles on P&P in this issue and the next.

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## Announcements

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### *Conference Update*

The P&P SIG has proposed two sessions for the 2008 STC conference in Philadelphia. One session was proposed by SIG-invited speaker, Raymond Uργο, and will be titled "Assessing the Maturity Grade of Policies & Procedures Programs".

Attendees of this session will learn a unique and simple model for rapidly assessing how well an organization's P&P program is positioned for providing performance-based communication. Discover the maturity grade for your organization's P&P program and how it compares to others.

The second session is titled "Topics of Special Interest" and is a proposed progression session with speakers from the P&P SIG as well as other SIGs with whom P&P shares members. We expect notification of acceptance (or rejection) later in December. We will share this information in the next issue of Direction.

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*Learn from the P&P Guru! Take Raymond Uργο's Online Course in April 2008*



### Introduction to Policies & Procedures Communication

A web-based course offered through University of California, Los Angeles Extension

**Dates:** April 10 to June 5, 2008

**Fee:** \$525. (possible discount for STC members) Course# 439.19 Reg# (pending)

**Instructor:** Raymond E. Uργο (rurgo@urgoconsulting.com )

**Contact:** UCLA Extension (310) 825-4192 or [www.uclaextension.edu](http://www.uclaextension.edu)

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## Telling Our Powerful Story

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Just finished a tough project? Got an experience to share about policies and procedures? Want to review a book?

Whether you're just getting started in P&P or an old hand, your fellow P&P SIG members want to hear your story and share your experiences.

Why not write an article for Direction or send an email to our listserv? Let's hear from you!

To submit an article or an email about your story, contact Lois Marsh at [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com) or Leigh Cordiner at [Lar-Lei@hotmail.com](mailto:Lar-Lei@hotmail.com).

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## CALL FOR VOLUNTEERS

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### Website Content Coordinator

In this role, you will have the opportunity to be as creative as you have time for! If your web skills are limited, your primary role would be to post and archive the quarterly newsletter, update static content when needed, and add announcements to the home page. Time requirement for these activities is about two hours every three months.

If you have more experience or want to acquire it, you can recommend and work on improving the site going forward. It is possible the SIG can provide software if you need it.

To volunteer or to learn more, email Dawnell Claessen at [mail@dawnell.com](mailto:mail@dawnell.com).

### Membership Coordinator

This role requires about one hour per month. The two main activities are monitoring and reporting on membership numbers, and emailing welcome letters to new members. There might also be the occasional project to promote membership in our SIG.

To volunteer or to learn more, email [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com).

### Listserv Coordinator

Our listserv manager is leaving at the end of this calendar year. We are actively recruiting a new volunteer to take on this role. We do have a good description of what the role entails. We have recently undertaken a migration from one listserv software to another, so the software should be quite stable. We estimate that this position would entail a time commitment of one to three hours per month. To volunteer or to learn more, email [mail@dawnell.com](mailto:mail@dawnell.com).

### Contributors — SIG Newsletter

We are looking for people to contribute or help compile articles for our quarterly newsletter, *Direction*. If you don't want to write, maybe you are able to research topics of interest to our members, then summarize your findings for the newsletter, or identify existing articles that we can re-print. To volunteer or to learn more, email [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com).