

Manager's Report: A Season of Renewal



The P&P SIG will start 2009 looking for new leadership. You might have seen or heard that 2008 has been an election year in America and we are preparing to inaugurate a new President.

I think that the peaceful transference of

power is one of the hallmarks of a functional organization. As an American I find this transference of so much power truly an awesome sight to behold. Observing this process as a technical communicator and documentation specialist, I realize that a good succession plan can mean the difference between surviving and thriving or between success and failure for countries, organizations and even special interest groups like our SIG.

Transitioning to new leadership...

For the last few years Lois Marsh and I have co-managed the P&P SIG and we think this arrangement has worked very well. But both of us also agree that we would like to have some new faces and fresh ideas for our members. So the first step in our succession plan is to look for new leadership candidates to come on board with the P&P SIG.

The "business" aspect of running the SIG is quite easy and can be done in a few hours per month. But the leadership and innovation aspects of running the SIG are where I feel we could really use an infusion of new talent and ideas. For example, I'd like to see the SIG develop some educational materials for our members such as webinars or even podcasts.

Any new SIG leaders will have as much or as little support as they need or want. STC has dedicated significant resources to providing support for SIGs and SIG leaders. There is a growing body of knowledge, experience and wisdom available for reference.

Lois and I will also be around to advise and help a new leader "spin up" into position. Raymond Urgo who founded P&P SIG and served as SIG manager for many years still serves the SIG as a valuable resource and sounding board.

SIG leadership has some terrific benefits...

There are a lot of reasons to consider becoming a SIG leader. For one thing, managing the affairs of a large group (± 750 members) on a limited budget is an adventure. It also provides excellent professional management and leadership experience. This certainly looks good on your résumé.

SIG leadership is also an excellent way to gain recognition and advance in the STC organization. And last but not least, SIG leaders may qualify for subsidies to attend the annual STC conference.

SO! Please consider volunteering to manage the P&P SIG - or co-manage, if you prefer. Lois and I will be here to develop a succession and transition plan to set you and the SIG up for success!

If you are interested, send an email to mail@dawnell.com or lois.marsh@bmo.com and we will be happy to discuss opportunities with you. Ideally, candidates will be interested in serving as SIG manager or co-manager for a minimum of two years.



Water Bird—Symbol of Renewal

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Surviving and Thriving Through the Economic Downturn

By Lois Marsh, SIG Co-Manager

Well, it's official; the U.S. has been in recession since December 2007. And most other countries are sure to follow if they haven't already. Here in Canada, we're just starting to see the bad news coming, but we've all been reading the headlines, so the "R" word is familiar to us all.

Many of our colleagues in the mortgage industry have been hit hard by the financial crisis. Investment banking will be going through incredible changes as we return to a more highly regulated environment — and while this may bring opportunities for P&P, the reduction in business still leaves us vulnerable. Other P&P areas may be more resilient, such as government, pharmaceuticals and health care, but we'll all be affected some way.

This will be the third recession in my working life. I changed careers after each of the first two — and although the prospect of job loss scares me, I also know it can be a positive force for change in our lives. Will we survive the downturn? Certainly, and in many cases even thrive. How? The usual way — build your skills and shout out to the world that you are ready for change. Look over your job description and think about what you can add to bring greater value to your organization.

My small team of P&P specialists is ALWAYS on the lookout for new ways to "re-package" and promote our skills. We recently offered to lead an internal communications improvement initiative that established us as the go-to communications resource in our division — we now publish a highly rated newsletter, do annual surveys on communications progress, and even help out with executive presentations from time to time. These have

raised our profile significantly, and are a nice creative change from the routine of policies & procedures development.

Here is a list of resources to consult if you are or may be among those looking for new opportunities in challenging times.

STC Resources

"[Job Hunting in a Recession](#)" by Jack Molisani, Associate Fellow, STC; Intercom, September/October 2008:

[Resources for Members During Tough Times](#): a whole page on the STC site devoted helping you improve your value.

And my personal favorite:

"[My Recession Strategy—Getting into the Top Third](#)" by Michael Hughes

Other Resources

Great book: "What Color Is Your Parachute? 2009: A Practical Manual for Job-Hunters and Career-Changers" by Richard Nelson Bolles. You can find earlier editions in the public library.

Networking is a proven way of finding out about job opportunities. Here's a site with some great tips: <http://jobsearch.about.com/cs/networking/a/networking.htm>.

And don't forget to share your ideas with our SIG! Write to the P&P SIG listserv at stc_ppsig@mailman.stc.org.

2009 Conference Update—Your P&P SIG Presents...

By Dawnell Claessen, SIG Co-Manager and Conference Proposal Coordinator

I am happy to announce that the progression session proposal submitted on behalf of the P & P SIG has been accepted by the conference program committee.

So it looks like the SIG will have another great showing at the Annual STC Technical Communication Summit May 3-6 in Atlanta, Georgia.

STC has announced a commitment to making this conference affordable. In keeping with this trend, P&P SIG will be rewarding our volunteers with meal tickets for the luncheon and banquet.

There are still a number of SIG volunteer opportunities leading up to the conference, so if you plan to attend the conference and are interested in volunteering, please send me an email mail@dawnell.com.

In addition to all the educational activities, let's make this conference a fun and worthwhile networking experience.

I will keep everyone posted on the scheduling details of SIG activities at conference as soon as they become available.

See you in Atlanta!



Policy Writing Guidelines

By Katherine D. Fisher

Several years ago, I put together what has turned out to be a very helpful list of guidelines for writing policies. If you're new to policy writing, these may be helpful to you as well.

When preparing to document a policy, consider the following:

What is a policy?

- A guiding principle designed to influence and determine decisions, actions, and related matters
- A policy states:
 - What is to be done
 - What resources and methodologies are to be used
 - But not how to do it

What does a policy do?

- Provides a framework of principles and constraints to be followed in decision-making
- Guides the organization toward a consistent pattern of decisions and direction of thought (implies latitude for discretion)
- Leads to (and may specify) planning, actions, and controls for implementing decisions

What are the guidelines for effective policies?

- Should clearly reflect objectives and plans; mandate set forth in the policy must be capable of being accomplished
- Should only contain direction with which compliance is mandatory
- Should describe criteria for current and future action
- Must be understandable
- Must be consistent
- Should be sharply distinguished from rules and procedures
- Should be viewed as subject to change

Policy substance

- Policies may indicate permissible latitude (e.g., "Reports may be oral or written")
- Policies should reserve the use of "shall" for situations in which the quality of command is appropriate for emphasis, and for cases where it is necessary to reproduce customer language that employs the word

Questions? Comments? Katherine Fisher can be contacted at kdfisher@aol.com

Other Resources for Policy Developers

Check out these and other resources listed on the P&P SIG's website:

Writing Effective Policies and Procedures: A Step-By-Step Resource for Clear Communication

by Nancy Campbell

Publisher: AMACOM (1998)

Establishing a System of Policies and Procedures

by Stephen Page

Publisher: Bookmasters (1998)

7 Steps to Better Written Policies and Procedures

by Stephen Page

Publisher: Process Improvement Publishing (2001)

How to Write Policies, Procedures & Task Outlines: Sending Clear Signals in Written Directions

by Larry Peabody

Publisher: Idyll Arbor; 3rd edition (2001)

Member Profile: Sherri Henkin



Direction: Tell us a bit about your background and career development, Sherri.

Sherri: I have a BA in political science from Boston University and a Master's in Public Administration from New York University. I wanted to formally write policies and procedures, so I joined STC in 2002 to stay current with technical writer news, employment, and educational opportunities.

When I moved to Cleveland, Ohio in 2004, my STC membership moved with me and it was an entrée into STC's Northeast Ohio Chapter. I'm basically an STC poster child – "everything I learned about technical writing and documentation, I learned in STC!"

Before moving into the P&P field, I had done everything from office manager to business owner, where I learned graphics and wrote advertising and marketing copy. I worked in small offices as well as in a large non-profit medical center – Cedars-Sinai Medical Center in Los Angeles (9000 employees).

It was there that I learned to write procedures, job descriptions, and informal employee communications. I enjoyed those parts of the work, so it was that job that jump-started me into P&P writer. I'm currently unemployed, but confident that a great opportunity is right around the corner!

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

Sherri: I worked most recently at AmTrust Bank in Cleveland, Ohio, first as a documentation specialist, concentrating on procedures for the Mortgage Default department. After a year, I was promoted to Senior Process Improvement Analyst in Mortgage Banking.

My most exciting professional development in the past year was to present at the 2008 STC Technical Summit in June, as part of the Policies & Procedures SIG Progression Session. My topic was "Moving from Documentation Specialist to Process Improvement Analyst – or – When Opportunity Knocks, Open the Door."

The presentation was based on my career journey from documentation specialist to process improvement analyst/business analyst, including the role STC has played in this process.

Direction: What do you like most about your career in technical communication?

Sherri: Learning from the various subject matter experts; improving my writing skills; working with dynamite managers who encouraged my professional growth. One thing I found difficult, though, was getting time with the subject matter experts' due to their extremely busy schedules.

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

Sherri: Join STC; volunteer in the local community/chapter; find a mentor; and read online documentation about P&P – from STC and its members.

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

Sherri: In challenging economic times, the P&P department in my industry (mortgage lending) may be one of the first departments to be down-sized.

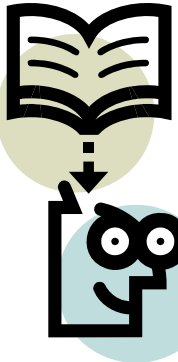
Direction: Tell us a bit of personal information about you – e.g., hobbies, where you live, your family, or other information to help us get to know you.

Sherri: I lived in Los Angeles for 19 years – where I still have many personal and professional contacts. My hobbies include writing creative non-fiction (several pieces have been published), reading, swimming, and traveling.

Sherri and co-author Sharon Resar Sternburg published "The Crucial Communicator's Role in Mortgage Banking" which is featured on STC's web site: <http://www.stc.org/story/mortgageBanking.asp>.

Sherri can be reached at sleah47@juno.com.

Book Review: The Spark—created by Lyn Heyward and written by John U. Bacon



Review by Sherri Henkin

Editor's note: Caught in a career rut? Looking for inspiration with a hint of "life coaching"? Then this book is for you. The review is re-printed with permission from the Northeast Ohio Chapter of STC's newsletter, "Lines & Letters."

The Spark is ostensibly about Cirque du Soleil. Truly, though, this deceptively thin volume carries a strong message about

creativity, about being inspired by and finding purpose in one's work.

Although this is a fictional account, the basis for the story is true. The Spark is about Frank's quest to re-ignite his passion for his career.

A successful sports agent, Frank had lost his enthusiasm amidst the meetings, routine calls, appointments, and other adult responsibilities in the quest to "make it."

In Las Vegas on business, Frank took a small side trip. He was searching for something and he was open to finding whatever the search revealed. "When people ask where my remarkable journey began, I tell them it was somewhere between the first and seventh doors." By opening the door, Frank embarked on an unexpected journey. He had entered the backstage door of Cirque du Soleil.

Cirque du Soleil embraces the philosophy that everyone must understand the show from all perspectives. At Cirque headquarters, there are show posters displayed in all of the hallways.

Performers who have the day off are encouraged to attend a performance so they see it from the audience's perspective. Even the kitchen staff attends rehearsals and shows. Otherwise, "they lose their connection to the final product ... If you don't understand the role you play, how can you be excited about what you're doing?" (p. 14)

While we may not be able to join up with Cirque du Soleil, we can travel with Frank. We watch the shows. Talk with the actors. Master some of the stunts. We learn about life from directors and coaches. We apply our own make-up, design sets. Yes, we do all of this because the writing style is so engaging.

We feel the cold, snowy day in Montreal (even though it was 90 degrees outside while I was reading this). We discover — or rediscover "...the creative spark that burns within us all." (p. 135) We learn that "[w]hen we finally give voice to your dreams, you never know what's going to happen." (p. 42)

Go ahead and give voice to your dreams! Regain your passion! And start the journey with The Spark

<http://www.neostc.org/lines/Archives/2009/0809.html>

Sherri is now embarking on her own unexpected journey, looking for her next opportunity in technical writing. She can be reached at sleah47@juno.com.

Book title :The Spark

Publisher: Doubleday; ISBN 0-385-51651-7

More Book Reviews Wanted — And We'll Pay for the Book!

Is there a book about technical communication you'd like to own? The P&P SIG will pay for your copy if you qualify for our book review program. How does it work? Up to four times a year, the editors of Direction will refund the cost of a qualified book on receipt of a book review and a purchase receipt.

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.



Announcements

Editing Service Launched by Adrienne Escoe

Escoe Bliss is happy to announce the launch of [Dr. Edit®](#), a high-quality, online proofreading and editing service.

Developed by Adrienne Escoe, PhD, senior member of STC and member of the Policies and Procedures SIG, [Dr. Edit](#) offers four levels of edit:

Level I, Basic Proofreading

Level II, Light Edit

Level III, Medium Edit

Level IV, Heavy Edit.

[Dr. Edit](#) lends an extra hand to busy technical writers, proposal writers, policies and procedures analysts, instructional designers, marcom writers, and many others.

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Would you like to learn more about [Dr. Edit](#)? Please visit www.dr-edit.com, send a message to Adrienne Escoe at aescoe@escoebliss.com, or call Adrienne at 949.336.6444 extension 202.

Upcoming Presentations by Raymond Urgo

[Technical Communication Professionals and the Economy—Is Self-employment the Answer?](#)

January 26, 2009 – Los Angeles, CA

Society for Technical Communication – San Gabriel Valley Chapter [www.stcsgv.org]

In this highly engaging presentation, Raymond Urgo advocates that to be successful in today's economy and workplace—whether employed or self-employed—technical communication professionals need to apply the principles and practices of the successfully self employed.

[Becoming and Remaining Highly Marketable in the Evolving Workplace](#)

March 19, 2009 – Los Angeles, CA

Society for Technical Communication – San Fernando Valley Chapter [www.stcsfv.org]

In this engaging and interactive presentation, Raymond Urgo discusses the trends affecting the economy and workplace, and how technical communication professionals need to adapt themselves to be valued and profitable professionals.