Pittsburgh Chapter STC Offers Unique Support Group for Job Seekers

For Pittsburgh residents who seek motivation and support during a period of unemployment, the Pittsburgh Chapter STC can help. Six and a half years ago, the chapter began sponsoring WorkQuest, a support group for people looking for work. According to the group’s informational brochure, WorkQuest “focuses on the specific tasks and issues of job searching, such as improving résumés, finding job leads, working on interviewing skills, and navigating the employment benefits maze.”

“No Job Is Permanent”

WorkQuest, led by Founder and Executive Director Janis Ramey and the group’s Board of Directors Chair Chuck Lanigan, holds weekly meetings on topics such as developing a personal marketing plan, behavioral interviewing strategies, and overcoming mental blocks and social barriers. The guest speakers are frequently career coaches who volunteer their time for WorkQuest, Ramey said.

Most of the group’s 160 active members are now working but choose to stay on the WorkQuest e-mail distribution list so that they can “provide insight to those still looking for work” and because “they’ve learned that no job is permanent, so they like to keep updated about what’s going on [in the job market],” Ramey explained.

WorkQuest has also begun hosting alumni meetings every few months. About thirty to thirty-five people attend each alumni meeting, Ramey noted. These meetings offer networking opportunities and allow WorkQuest members who have found work to maintain their strong bonds and friendships.

Open to All Fields

WorkQuest members do not need to belong to STC. As the group has grown, an increasing number of members looking for work in fields other than technical communication have joined. Ramey estimated that around 40 to 50 percent of members are not technical communicators. “We have members who are engineers, managers, salespeople, HR specialists, and graphic designers, among others,” she said.

WorkQuest also transfers its efforts to the Pittsburgh chapter as a whole. The group sponsors the annual career roundtable at the January chapter-wide meeting. WorkQuest will also serve as a test group for an online training site developed by AARP.

Other Chapter Activities

The Pittsburgh chapter’s other successful activities include its newsletter, the Blue Pencil. Edited by Meg Papa, the Blue Pencil received an award of Merit in STC’s 2007 Newsletter Competition.

President Nancy Carpenter and other chapter officers have worked to recruit local companies ComponentOne, Group Wellesley, and Five Star Development as corporate sponsors. These companies receive visibility via the chapter Web site and newsletter and benefit from an increased applicant pool for writing positions.

The chapter continues to host its popular Software Saturdays programs twice a year. Held at a local training center, these events provide a workshop-type setting for participants to receive training in various software applications.

In the near future, Carpenter said, the chapter would like to continue to reach out to other writers in related fields, such as medical or business writing. The chapter is also considering conducting a joint meeting with the Pittsburgh chapter of the American Society of Indexers. “We’d like the opportunity to meet other writers and to learn more about what’s going on in our field,” Carpenter said.

For more information about the Pittsburgh Chapter STC and WorkQuest, visit www.stcpgh.org or home.earthlink.net/~workquest.

If you would like to nominate your community—or another STC community—for consideration for Community Spotlight, please send information about community activities to Cecily Walters, Associate Editor, at cecily.walters@stc.org.
**Dear Editor,**

I would like to express my appreciation to Don Bush for his column The Friendly Editor. Out of all the things I enjoy reading in *Intercom*, and there are many, Don’s column was always my favorite. Don was a most unusual blend of practical writing earned from years in the technical communication business, and an academic and teaching ability that put him in touch with all that was great about writing. I learned more about writing from Don Bush than from any other person in the Society for Technical Communication, and I am greatly saddened that his wisdom will no longer grace the pages of this magazine. Our writing has all been made better by his insights, and I hope we can carry his concern for good writing forward without him.

Charles R. Crawley  
Senior Member

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**Dear Editor,**

I just received the December 2007 *Intercom*. It saddens me to see that Don Bush’s column has come to an end. It was the first article I would look for when an issue of *Intercom* showed up in the mail. I just want Mr. Bush to know how much I appreciated his real-world approach to English language usage. When I’ve had to deal with clients who expected adherence to particularly constraining and arbitrary grammatical conventions, the common sense advice of The Friendly Editor has been a reassuring godsend.

Thank you, Mr. Bush, for communicating your love of language and writing.  
Greg Shields  
Senior Member

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### Action!

Since your favorite developers are too busy to sit by your side while you document their applications, try the next best thing: record their demos to DVD.

STC member Tom Johnson explains this approach in a post dated December 15, 2007, on his blog *I’d Rather Be Writing* (www.idratherbewriting.com). The company provides writers with videocameras that record to DVD. Writers point the camera at the developers’ computer screen to record demos of new features as well as the developers’ explanations. With this method, writers have a resource they can refer to constantly while creating documentation. To ensure their compliance, developers cannot mark a feature as complete until their demo is recorded.

If you’ve ever tried this approach, drop Tom a line (tom@idratherbewriting.com)—and send a note to *Intercom* as well (intercom@stc.org).  

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### Grammar Casts Its Spell

All but the most ardent grammarians would admit that grammar, for all its utility, is also tedious. So it comes as a surprise to learn from John McIntyre, an assistant managing editor at the Baltimore Sun, that the English words *grammar* and *glamour* (current meaning: “An air of compelling charm, romance, and excitement, especially when delusively alluring”) share the same root.

On January 22, 2008, McIntyre posted on his blog, *You Don’t Say*, the Oxford English Dictionary’s (OED) account of the words’ history (weblogs.baltimoresun.com/news/mcintyre/blog/2008/01/the_glamour_of_grammar.html). While *glamour* hasn’t strayed much from its original meaning (“Magic, enchantment, spell”), *grammar* traveled far to acquire its association with “magic.” During the Middle Ages, *grammatica* referred to the study of Latin, and subsequently became a shorthand for all learning, which, to many people, included knowledge of magic and astrology. *Glamour* is a corrupt form of Old French *gramaire*, “which was sometimes used as a name for these occult sciences,” according to OED.  

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February 2008
You’ve made your case to design and produce online training. Your company has agreed that this is needed. You’ve developed a production process and are ready to begin. Then your manager asks you how you’ll determine that the online training is successful. What do you do? Anyone involved in the design and production of online training encounters the problem of measuring quality. Particularly in the context of online training, with its numerous elements and inputs, this can be difficult.

What is quality? Is it instructional integrity, marked by matching content to learning objectives? Does it imply that the product is based upon sound instructional strategies? That the courseware is well designed and pleasing to the eye? That the training has few defects or functional problems? Is quality determined by how well the instructional product satisfies the user’s requirements? By whether the users like it and the buyer is satisfied? This article clarifies quality assurance (QA) and how it can be applied to the production of online training.

Take a look at Figure 1, a screen capture from an online training course for United States Air Force civilian employees. Note the interface, navigation, colors, text, titles, and control buttons. How would you determine quality in this case? Would you look at the attractiveness of the screen, the content, colors in the interface, the navigational elements, the control buttons—or everything?

In fact, this particular online project required our QA personnel to look primarily at functionality—how the training course works.

The interface, including colors and titles, was approved well before development actually began. In this case, the developer and customer focused almost exclusively on the functionality of the program because the intended audience had not previously participated in online training. Colors and aesthetic design took a backseat to what the training program could actually do for the user.

QA is driven by the purpose of the online training and the specific needs of its intended audience. While in this example functionality was foremost, in other cases, QA may require looking at every element of the training or focusing...
on a certain set of criteria. Because the purpose and audience change with every project, good QA activities should be spelled out clearly within development processes. To make QA as easy to implement as possible, this article provides four QA steps to be implemented during the production of online training.

**Step One: Create a QA Plan**

Before doing any development, create a QA plan specific to online training. In this step, you are creating documentation to support the development process, not necessarily performing QA reviews (those come later in the process). This is a global plan that governs QA from the beginning of the development process until the final delivery of the product.

The foundation of such a plan, which has four parts, is driven by both instructional needs and customer expectations. Since these sometimes conflict with each other, relying on a written QA plan is a must to correctly implement quality during both design and production. Here are the steps to create a good QA plan:

1. Establish requirements for instructional quality based on content, customer expectations, the advice of subject matter experts (SMEs), and practitioner design knowledge.
2. Develop a clear instructional design process for the project.
3. Establish clear production processes to be followed by all personnel involved.
4. Create a documentation plan that clearly specifies customer expectations, guides the development of a design document, and creates a process for developing both defect reports and a revision plan.

The following documents can be included in a documentation plan:

- **Requirements specification**—based on customer expectations
- **Style guide**—lists and explains key design features and controls the design process
- **Design description or blueprint**—details the design plan
- **Review and audit schedule**—covers the life of the design project
- **Defect reports and revision requests**—report defects to designers
- **Revision verification and validation plan**—validates that revisions have been made

Without such a plan or the documents that make it real, projects can suffer **scope creep**, meaning that the size of the project grows as it nears completion, often moving beyond boundaries that both the customer and practitioner have already defined. When this happens, QA activities must sometimes stretch beyond practical limits to cover longer development processes. A strong QA plan can help rein in unwieldy projects.

These four QA recommendations and their corresponding documentation are essential to the first step of developing a QA plan. The design process is easier when the QA plan is established from the beginning.

**Step Two: Focus on Sound Instructional Design**

Early in my industry experience, I learned that a QA plan for online training development must be based upon the underlying instructional design. Proper instructional design is like scaffolding. With it, the content has internal structure and conformity, and there is a
framework for understanding. Without it, content can seem loosely structured and perhaps irrelevant to the objectives. An examination of the course objectives, content structure, instructional strategies, practice and assessment, and conclusions typically helps determine whether a course is instructionally valid.

To be certain that the instructional design of your interactive training is sound, ask yourself the following questions:

- How well does the instructional design of the training material match the learning needs of the users?
- Are the objectives measurable?
- How well does the design document list the instructional objectives, describe the content, and plan the program’s structure?
- How clear is the assessment, and is it linked to the instructional objectives?
- How appropriate are the instructional strategies used to design the instruction? Do they match the needs of the primary audience?
- How closely are the course sections aligned with the instructional objectives and the assessment?
- If necessary, are expectations for synchronous versus asynchronous activities clearly identified?
- Is the navigation intuitive?
- How usable is the interface, and does it match the content?
- Is there a metaphor used for the training, and if so, how effective is it?

Good instructional design will engage users and help them learn. If the instructional design is sound, the online training product will have the instructional integrity needed to help learners meet the instructional objectives.

Figure 2 details a section overview offered along with the learning objectives. For an instructionally sound training program, make sure that your instructional objectives match the content, along with the assessment. This will determine if the instructional thread is uninterrupted throughout the online training product. QA’s role, if properly prepared, can include a review of the underlying instructional design to help ensure that the online training will accomplish its claims.

The functions of this screen are (1) to provide the user with a preview of upcoming content and (2) to specify the instructional objectives, which tell the user what content there is to learn.

**Step Three: Apply Specific Criteria to Measure Quality**

QA is built around ensuring that projects meet basic requirements—often by exhibiting previously agreed-upon criteria. Brandon Hall, a noted e-learning researcher and consultant, hosts annual online training awards and has created very relevant criteria for evaluating online training. His criteria are used to determine the best new online training products in the marketplace. His Web site at [www.brandon-hall.com](http://www.brandon-hall.com) is an excellent place to learn about quality in online training. From Hall’s criteria, we can ask some basic questions.

First, is the content okay—does the course include what is supposed to include per the customer or original intent of the project? What about the course’s design—is the instructional design sound? Will users learn from the way in which the course is sequenced? Is the program engaging and motivating, and does the user have a mechanism for input? What about the navigation—are all normal navigational features in place, such as a course or site map and exit buttons?

In addition to these criteria, the use of media in online training can also be a quality point. The training should appropriately play media elements such as video, audio, animation, and sound, and all these elements should be packaged together so that the program can be used as a single unit, rather than narration from one source and video from another, for example. Media can greatly affect users’ enjoyment and motivation, so they should be closely paired to the interests and demographics of the audience.

Finally, aesthetics and tone are also important factors in online training quality. Each screen should be attractive and appealing to the user, with colors and graphics chosen to carefully match the audience’s expectations. The tone should also be congruent with the audience, avoiding any hint of condescension or trite language.

On his Web site, Hall includes quality measurement criteria that span different categories, such as instructional design, functionality (navigation, media, and so on), and services provided by the training program (record keeping, motivation, and evaluation). Content is
primary; Hall wants to make sure that training programs are reliable, covering what they are supposed to cover. His criteria make an excellent quality checklist for online training designers and developers.

Lynette Gillis, who wrote *Quality Standards for Evaluating Multimedia and Online Training*, presents another set of standards in a four-stage QA process:

Stage 1. Match courses to organizational needs.
Stage 2. Conduct a content review.
Stage 3. Conduct a usability review.
Stage 4. Conduct an instructional design review.

In stage 1, matching courses to organizational needs, Gillis reviews the quality of the content, the objectives, and the audience (the learners). She also evaluates course management tools and examines both the technology used to design the product and the technology needed by the learners to use it.

In stage 2, conducting a content review, Gillis examines the content along with the clarity of the multimedia presentation. She also considers whether the learning requirements match those of the user to ensure “fitness for use”—basically, an instructional design tactic. In other words, as good technical communicators do, she is analyzing the intended audience. Finally, she looks at the appropriateness of cultural, gender, and racial items.

In stage 3, conducting a usability review, Gillis looks at the technological concerns of the training, including how easy it is to install, the speed of the courseware, the design of the interface, and the functionality of the navigation and menus.

Finally, in stage 4, conducting an instructional design review, Gillis examines the content modules, media (graphics, animation, video, audio), and the ability of the course to involve the user in higher-level thinking and interaction. Gillis also looks for evidence of instructional integrity, found when content modules match assessment, objectives, and appropriate instructional strategies.

Both Hall and Gillis have identified important criteria for measuring the quality of online training, and both sets of guidelines can be equally effective to use as checklists for good QA.

**Step Four: Reduce Quality Costs and Eliminate Barriers**

Barriers to effective QA exist even when a course is well designed and meets all the customer’s expectations. Two potential inhibitors of effective QA are its costs and the walls sometimes raised by people or organizations involved in the development process. The cost of QA is an opportunity cost: the actual expense of not doing it or taking an alternative route can exceed the cost of doing it and doing it well. In other words, if you don’t ensure quality, you may pay more in the end to redo a poorly developed product.

QA costs are typically measured by the actual cost of performing QA activities rather than the very real cost of *not doing* QA, which causes rework because of persistent errors and product defects. Schulmeyer and McManus, authors of *Handbook of Software Quality Assurance*, explain it this way:

If the quality assurance task costs one amount, but the result of performing that task saves another amount, the real cost is the *difference* between the two, not the initial cost of the activity.

A good rule of thumb is that QA should represent about one-third—or 30 percent—of the total cost of design and production, while planning, design, and development constitute roughly 50 percent of the total cost. Production should account for 20 percent. QA efforts become more efficient when design and production personnel work together to reduce errors throughout the process and thus reduce the number of hours required to accomplish QA activities.

Follow these steps to estimate quality costs:

1. List all major QA activities.
2. For each development phase, list both tasks and deliverables.
3. For each development phase, determine customer and supplier requirements and project parameters.
4. For each development phase, analyze parameters, determine the level of effort required for QA activities, and estimate the cost of this effort.
5. Compare the cost of QA to that of design and production.

The importance of tracking costs in QA is clear, as is the relationship be-
Between a QA function and sound online training. If QA consistently emerges as a major expenditure in development projects, management may step in and raise expectations during design and development, or may react negatively and cut back QA activities in order to lower costs. In either case, the project is likely to suffer. Keeping QA activities as efficient as possible can help protect its role in the design and development process.

Barriers to QA

As mentioned earlier, walls are sometimes raised by people or organizations involved in the development process. Sometimes this is necessary to streamline production time, or results from a turf battle over who “owns” different phases of the project and the product itself. As in many production processes, three potential barriers can derail the QA function:

1. Organizational placement. If QA is not an independent function that reports either outside or higher up in the production organization, it will likely be ineffective. Design and development personnel may often take up matters with the project manager rather than working with QA personnel, who may require more product revisions. When QA is separate, it has more authority to guarantee that quality recommendations will be implemented.

2. Resistance actions. Development and production staff may resist QA activities, or the reverse may happen—QA staff may resist design and development procedures.

3. Funding issues. When funding is not held at the same level as other design and production phases, quality is compromised.

In all three cases, effective planning for QA at the beginning of a development project can forestall the creation of these barriers. To protect QA, its time must be estimated as part of the effort required for successful project completion. Project staff must be educated about the value and proper place of QA, and the organizational structure must support the role of QA as an independent auditor of courseware.

Necessity, Not Luxury

Many good things happen in a well-designed online training production process. At the same time, production is often vulnerable to turf wars and the resentment development staff feel toward a QA team earnestly hunting for defects. Having a strong QA plan is a cost-effective means of forestalling these negative effects and turning out a good, almost defect-free product. Probably no product is completely defect free, but if you follow a good QA plan, you can eliminate most defects before the product is released. Each step in this article is meant to be a guide to developing efficient QA in the production of online training. Employing a robust QA process is not a luxury, but a necessity.

Suggested Readings


Dr. Susan Codone is a senior member of the Mercer University Student Chapter STC and an assistant professor of technical communication at Mercer University’s School of Engineering in Macon, Georgia. Before coming to Mercer, Susan spent five years working for the Raytheon Company as a manager of online training production. In that position, she conducted research on quality assurance practices as well as implemented quality assurance procedures in the Raytheon development process. Contact Susan at codone_s@mercer.edu or +1 (478) 301-4185.

Discuss this article online at stcforum.org/viewtopic.php?id=1193
One of the greatest challenges of teaching a training course—whether in a traditional classroom or, even more urgently, a virtual classroom—is managing the expectations of learners.

Some learners don’t read the course description, and, as a result, aren’t ready to take the course. Others read the description but have unrealistic expectations, either because they misunderstood something or read something in the description that wasn’t intended.

In other instances, learners have realistic expectations but their demographics differ from those the instructor expected. As a result, the course content is slightly off-focus.

A pre-class Learner Information Form can help instructors identify learners’ demographics and expectations before a class begins. This article explains what a Learner Information Form is, provides an annotated example of one, and suggests procedures for administering it.

What Is a Learner Information Form?

A Learner Information Form is a questionnaire sent to students one to two weeks before a class begins. The form requests information about learners’ backgrounds, previous experience with the subject, and expectations.

Admittedly, some of this information—especially demographics of learners—should come from a needs assessment conducted before the course is designed. But in many instances, the intended audience and the actual one might vary. This often happens with open enrollment classes.

In other instances, a needs assessment might only provide general information about learners. The Learner Information Form can provide more specific information. With it, the instructor can tailor the learning experience to the needs of the actual learners.

Should the responses to the Learner Information Form indicate that a majority of enrolled learners differ from those anticipated, that’s a signal to organizations to determine why that is occurring.
An Annotated Example

So what exactly does a Learner Information Form look like? Figure 1 shows how one such form might look for a classroom-based workshop called "Advanced Design for Online Learning."

Opening comments: The opening statement confirms enrollment, describes the purpose of the pre-class survey, and specifically identifies completing it as an action item. Providing a specific return date tells learners when you expect them to reply.

You should provide instructions for returning the form. For example, should the form be completed at a Web site, or copied and sent by e-mail? The options vary by both instructor preferences and technology infrastructure. Choose an approach that is most convenient.

Question 1: Personal information. This item asks for information about the learner and the organization in which he or she works, as well as some quick information about the learner’s previous experience with the subject matter. The description for this course states that learners should have designed at least three courses previously. The response to this question will indicate whether learners meet this qualification. (Remember, just because the course description states a qualification does not mean that learners will follow it.)

Question 2: Reasons for attending class. This question identifies learners’ general motivation for signing up for the workshop. Typical motivations include the following:
- Required by a supervisor or some other external force
- Chose to take for personal interest
- Chose to take to further career

Or, as often happens with this workshop, learners want to improve a core job skill.

Question 3: Formal training. People who develop online tutorials—the intended learners for this course—typically come into the position from one of two routes: either as instructional designers or as Web designers. The skill sets required for these fields are not the same, and experienced professionals need both. Most learners usually feel they’re stronger in one or the other because they’re trained in it. Through the Learner Information Form, the instructor can find out which fields learners are trained in and adjust course content as necessary.

Question 4: Self-assessment. This item provides a self-assessment of learners’ skills. Of course, some learners overestimate and others underestimate their skill. The actual assessment comes in class. But this item gives instructors an insight into students’ self-efficacy (that is, how well they think they can perform), which, in turn, affects their ability to master the content.

Question 5: Learner’s weaknesses. This item asks learners to specifically assess their weaknesses. This information can be used to determine the extent to which the course content addresses the identified weaknesses—a well-designed course should address at least some. If several learners name a skill that the course does not address, the instructor might consider making a quick adjustment to the content.

Question 6: Learner’s expectations. This item asks learners to state their expectations for the course. As with the previous question, instructors can use this information to gauge the extent to which the material matches the expectations. If an appropriate expectation is missing from
the course content, the instructor can quickly revise the course before the class begins. Similarly, if a learner indicates an expectation that will not be met, the instructor can inform the learner before the class begins and ask whether the learner still wants to participate. If not, the instructor might suggest that the learner take a different course.

**Question 7: More information.** This catch-all question is intended to gather information not already collected. Most learners either reply “No” or leave the response blank. Those learners who do respond usually provide information about learning disabilities, preferred learning styles, schedule conflicts, and other practical issues.

**Administering the Form**

In addition to asking useful questions, careful administration ensures that the Learner Information Form serves as an effective tool in managing learners’ expectations.

For the Learner Information Form to have the most value, instructors should do the following:

- **Distribute** the form to students one to two weeks before the class. The challenge for many instructors is getting the learners’ contact information, because instructors often rely on third parties for this information. If this is the case, request the information one week to ten days before you need it.
- **Send** the form by e-mail.
- **When** sending the e-mail, include PLEASE REPLY BY in the subject line and specify a date. In this way, learners know immediately that a response is required and when.
- **Work** the name of the course into the rest of the subject line, so learners do not dismiss the Learner Information Form as spam.
- **In the body** of the e-mail, provide instructions for completing and returning the Learner Information Form as well as a date for returning the message.
- **When** replies come in, send a personal reply acknowledging receipt. This helps build relationships before the class begins.

- **If there is other information learners need to know before starting class**—such as making sure that they bring certain materials to class—send the information either in the note asking learners to respond to the form or in the follow-up note that thanks them for sending the form.
- **Note the responses.** If needed, make adjustments to the course content to reflect the needs of the learners (as time permits).
- **If needed, contact students who have unrealistic expectations or fail to meet minimum criteria before class begins.**

**Good for Tutorials, Too**

Although this article focuses on using the Learner Information Form in the context of live classes (both classroom and webinar-style), the form can also be used with self-study tutorials. Because the course content of tutorials is usually fixed and cannot be updated as easily as a live class, learners’ suggestions might not be addressed until the next cycle of revisions.

Learner Information Forms have many benefits, but the most tangible is happier students who usually give higher evaluations to the instructor. Saul Carliner has published five books on e-learning, including the upcoming E-Learning Handbook: Past Promises, Present Challenges (Pfeiffer) and the best-selling Designing E-Learning. He is a past president of STC and an associate professor of educational technology at Concordia University in Montreal. Contact: saulcarliner@gmail.com.

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Localizing Sans Clichés

Web Site Localization without Resorting to Stereotypes

BY MARINA LIN
Today, everybody knows stereotyping is taboo. We bristle at the mention of certain words, carefully choose our verbiage, and compulsively prefix and suffix to create inoffensive monikers for different groups. Similarly, as Web developers, we want to avoid stereotyping when we localize Web sites for particular target audiences. All too often, though, we instinctively turn to old methods of researching group culture, rhetoric, and preferences so that we can appeal to people on their own terms. Our intentions are good, but our outcomes may not be. Messages localized via traditional methods may seem condescendingly pandering and may alienate the very audiences we want to attract. That is not to say that Web sites should remain global and general, but rather that special care must be taken not to approach the process of localization in a way that results in a cultural parody.

Because of our human tendencies to generalize and cater to the lowest common denominator based on our training, avoiding stereotyping and generalizing when creating a product for a large audience is never going to be entirely possible. Therefore, this article discusses practical and simple Web design and usability techniques that will help those who localize Web sites for new audiences, even if they are large, to look at their projects with a fresh outlook and try not to fall back on generalization.

**What Constitutes Stereotyping?**

In their book *Intercultural Communication*, Ron Scollon and Suzanne Wong Scollon write that, to get a sense of a culture as a whole, one must take into consideration the full complexity of all underlying cultural themes. Singling out one of those themes for emphasis, be it positive or negative, is considered a cultural ideology—or, more commonly, “stereotyping.” Stereotyping occurs in two main ways: (1) when we treat any two cultural or social groups as if they were polar opposites and (2) when we apply general characteristics attributed to the group as a whole to each individual member. Stereotyping, therefore, may take place when we overgeneralize and oversimplify during our analysis of a particular group.

Generalization does not necessarily have to focus on negative attributes to constitute stereotyping. For instance, suppose we learn through research and observation that our intended audiences in both Denmark and the United States prefer similar imagery. We may then assume that the Danish audience also prefers navigation that would be acceptable in the United States. By making this assumption, we stereotype by practicing what Scollon and Wong Scollon call the “solidarity fallacy.” The solidarity fallacy occurs when people falsely assume that their own group is similar to another without first doing research. They also define the “lumping fallacy” as occurring when we fail to consider distinctions among groups. For example, considering all Asians as members of the same group is succumbing to the lumping fallacy.

The solidarity and lumping fallacies are critically important in the image-rich digital age. As Emilie Gould, author of an aggregate guide synthesizing the literature on cultural values, states, people communicate with images of each other: you communicate with an image of me, and I communicate with an image of you. As Web developers, we must understand that our particular mindsets will govern our choices in Web design and content elements. Hence, an American who localizes a product Web site for Denmark should understand that while certain similarities to American culture (such as high individualism) do exist, other Danish attributes (such as views on femininity and masculinity) are very different.

When we have limited resources for localizing a Web site and are unable to research all relevant aspects of the target culture, we are more likely to oversimplify local cultural nuances. We may be asked to use previous work on a dif-

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**Table 1. Common Cultural Stereotypes in Web Design.**

<table>
<thead>
<tr>
<th>Solidarity Fallacy</th>
<th>Ways to avoid stereotyping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasked with localizing a Web site for Denmark, you learn that this culture is particularly individualistic, much like the American culture, and therefore would prefer imagery showing individuals on their Web site.</td>
<td>Do not assume that their navigation preferences would mirror what Americans expect, since Denmark differs on the masculinity/femininity dimension and focuses more on relationship-building than goal-orientation.</td>
</tr>
<tr>
<td>Lumping Fallacy</td>
<td></td>
</tr>
<tr>
<td>Through previous experience in Web site localization, you have learned that the Chinese culture possesses certain characteristics which you will need to consider in Web site development in other Asian countries.</td>
<td>If faced with localizing a Web site for Korea or Japan, do not assume that these characteristics would hold up based on the fact that these countries share the same continent.</td>
</tr>
</tbody>
</table>
Different culture as our guide in customizing a Web site for a new target audience. We may also resort to obvious imagery and tone and thus oversimplify and generalize a culture on the basis of our own limited understanding. Oversimplifying and succumbing to the solidarity fallacy can sabotage an organization’s chances of a positive reception by the target audience. Table 1 provides a further example of both fallacies.

Avoiding Stereotyping in the Web Design Process

When it comes to intercultural communication, Geert Hofstede’s theory of universal cultural dimensions—based on a series of surveys conducted with IBM employees in seventy-two national subsidiaries—is the best known and probably most applied. We often look to Hofstede’s cultural dimensions—power-distance index, individualism, masculinity, uncertainty avoidance, and long-term orientation—when localizing Web sites. But these should not be the last word in how we shape design and content for particular groups. Hofstede identified the forces that govern individuals’ patterns of thinking, feeling, and acting as “software of the mind.” He discussed, for example, how acceptance of power differences or masculine versus feminine characteristics varies quite widely from culture to culture. Many technical communicators, particularly Web developers, use his cultural dimensions as metrics to gauge localization.

While these dimensions may be a good starting point for localization, Hofstede himself stated that, besides culture, two other levels of human mental programming exist: the universal level, which comprises characteristics inherent in human nature, and the individual-specific level, which comprises unique traits and experiences.

Since all three levels of mental programming influence the effectiveness of Web communication, technical communicators must avoid the tendency to assume that all members of a target culture will think and behave in the same ways on the basis of any given cultural dimension. For example, even though Singapore has a high power-distance index (defined as the extent to which people accept power and authority), not all of its citizens respond instinctively to authority. Localizing for Singapore would not necessarily mean restricting the navigation choices a Web site visitor encounters on the home page, especially given the fact that Singapore scored very low on the uncertainty avoidance index—defined by people’s tolerance of ambiguity—compared to other Asian countries. It is important to think, first, about how these factors will fit in the context and purpose of the Web site, and second, about how they will fit in the context of the target culture.

Conducting a reality check at each step of the way may also help. Stop and ask yourself these questions:

• Does my target audience analysis, as based on Hofstede’s dimensions, show the culture as it actually is?
• Have I conducted sufficient research, such as card sorting and usability testing, to back up my design choices?
• Do my design decisions seem oversimplified, and could they come across as condescending?

In other words, instead of simply going by a general analysis based on Hofstede’s dimensions or other researchers’
cultural findings, attempt to describe the culture and your target market in your own words, using fresh ideas.

Some of the tasks that must be completed before beginning the process of Web site design or localization involve standard information architecture and usability techniques. Even in these early stages, Web developers can work to avoid stereotyping by taking the following steps.

**Developing a User Persona**

Andrew C. Connolly and other researchers from the University of Pennsylvania conducted a study examining whether concepts are viewed as stereotypes based on work by previous researchers. Connolly’s research group found that people do not automatically default to stereotypes when familiar concepts are combined in novel ways. For instance, when creating a user persona for a particular function of a Web site, we must take care to create a unique and customized persona, rather than simply putting together assumed characteristics of a typical user. The characteristics we combine will create a more novel and less stereotypical user persona. A novel user persona will, in turn, be more useful to the Web developers who will choose which site elements to develop for maximum user benefit.

**Card Sorting**

When localizing Web site architecture, it is especially important to remember that local users may parse and process information differently than we do. To avoid stereotyping, let the local users themselves tell you what to do. You can use card sorting to determine how users process information. As Carol Barnum describes in *Usability Testing and Research*, to use the card-sorting technique, give users a stack of cards. Each card should contain a different topic and category from the Web site. Provide users with blank cards so that they can add topics and categories that they think are missing from the stack. Have them organize the cards into a system that makes sense to them, and ask them to explain their reasoning. A simple technique such as card sorting can provide a wealth of information on how the target audience sees your Web site taxonomy, and will help you design the navigation and architecture accordingly.

**Analyzing Audience Expectation and Web Site Purpose**

Many Web developers use Hofstede’s power-distance and uncertainty avoidance indexes to determine how limited or broad in scope a site’s navigation should be. If the target audience comes from a culture with a large power-distance index, a culture in which the decision makers are expected to be autocratic, Web developers may restrict the selection of items that visitors can access.

If a culture tends to be averse to uncertainty, Web developers might also limit the number of options users can choose. While Hofstede’s dimensions are useful, you should consider the extent to which they are valid for your specific target audience. For instance, when building a university Web site in the United Arab Emirates—a nation with high power-distance and uncertainty avoidance indexes, which theoretically imply limited navigation and access—you would take into account...
that the primary audience is composed of students aged 18–22. Young people who are very familiar with Web-based communication may not expect or benefit from limited navigation.

**Selecting Web Site Imagery**

Web developers are most likely to fall into the stereotyping trap when choosing site imagery. This tendency is especially unfortunate given that imagery drives first impressions in a medium where a potential visitor could be lost in seconds.

In choosing images and icons, Web developers should clearly analyze their target audience’s culture. But such analyses can easily create faulty assumptions. For instance, in localizing for a culture that is strongly collective (as opposed to individualistic), we might assume that our audience will expect pictures of groups of people. We might also be tempted to use images of people in traditional garb or in well-known settings. Such depictions may be perceived as stereotypical—signaling that the company has failed to get beyond simplistic and obvious views of the target audience.

To avoid faulty assumptions when determining the look and feel of a site, it may be more effective to focus on the product, rather than the people associated with the product. For example, a company that sells household cleaning products might display colorful images of its products rather than images of people using them. For similar reasons, when choosing icons, it is important to keep imagery general. For example, using chopsticks as an icon in a site localized for Japan is not generally necessary, because today’s Web site users are familiar with the icon of a fork.

**Translating Content**

At some point, your Web site’s content will undergo translation into the local language, but word-for-word machine translation will not be enough to customize the content. It is best to hire local writers whose native language is that of the target culture. That is, hire people who can translate into their native language. Make sure, however, to ask the translator to avoid slang, which will come off as too casual. The translator should also avoid reflexively employing the rhetorical organizations of texts described so well by Robert Kaplan in the mid-1970s. In analyzing the organization of individual paragraphs in the compositions of ESL students to identify rhetorical differences in contrast with the English paragraph structure, he found that Asian students tend to organize their writing deductively, whereas students from the United States organize it inductively. In developing a Web site, we may be tempted to structure content according to the rhetorical structure supposedly tied to it. Before we do, though, we should note that people of different cultures are readily able to process a variety of rhetorical structures. In fact, in studying newspaper articles from Asian and Western cultures, Scollon and Wong Scollon found no differences in the articles’ organization.

Rather than organizing according to Kaplan’s research on contrastive rhetoric, which was based on writing samples from university students, we may do bet-

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**Table 2. Tips for Avoiding Stereotyping in Localization**

<table>
<thead>
<tr>
<th>Steps in Web design process</th>
<th><strong>DO</strong></th>
<th><strong>DON’T</strong></th>
</tr>
</thead>
</table>
| Information Architecture |   - Create complex user persona  
|                           |   - Card sorting            |   - Make assumptions based on Hofstede’s dimensions   |
| Look and Feel              |   - Use general imagery        
|                           |   - Focus on topic, not people |   - Use specific icons           |
|                           |   - Inject stereotypical traits |   - Translate word for word |
| Content                    |   - Heed local rhetoric        
|                           |   - Allow for confirmation bias |   - Use slang            |
| Usability                  |   - Conduct tests with local users |   - Assume everyone will complete each task in the same order |

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By placing general content first, we create a site that promises to be useful to many, not just the targeted audience.

Because it is not always possible to contract a local Web designer, it is critically important that we conduct usability tests with local users. It would be helpful to contract professional usability testers from the local culture as well. Common usability techniques, such as the think-aloud protocol and critical-path task completion, may vary across cultures. Some cultures, for instance, might perform tasks in a different order than we might expect. Web developers need to pay close attention to the findings of local testing.

Remain Sensitive Yet Judicious

Avoiding stereotypes is not always a straightforward task. As technical communicators, we must be sensitive yet judicious regarding the information about a target culture we have at our disposal, and use it accordingly. Table 2 summarizes the steps we can take to avoid stereotyping.

With further research, we may develop more ways to rid ourselves of the pesky penchant to oversimplify and generalize—particularly in such an important task as localization.

Suggested Readings


Marina Lin is currently a student in the graduate technical communication program at the Illinois Institute of Technology, where she is concentrating on information architecture. She is also the Web design lead at Career Technical Communication at the Illinois Institute of Technology for her comments on and editing of this piece.

Discuss this article online at stcforum.org/viewtopic.php?id=1195
IMPLEMENTING STRUCTURED FrameMaker

Real-world Suggestions for Surviving the Move to Structured Authoring
Over the past several years, the technical communication profession has enthusiastically embraced structured authoring as a general best practice. Structured authoring encourages content reuse, improves consistency, and represents the future of the profession. The fact remains, however, that moving from unstructured to structured authoring is intimidating. It involves new workflows, steep learning curves, legacy documents, and monetary investments in new tools and training.

In an attempt to alleviate some of the anxiety and encourage more people to make the move to structure, this article addresses the most common questions—what is structure, why move to structure, and when is the best time to make the move. The article also suggests a practical implementation plan. The implementation suggestions are based on Adobe’s structured version of FrameMaker and gleaned from real-world experience, as I recently made the move myself.

What Is Structure?
Simply put, structured- or XML-based authoring is not style-based; it is element-based. It is also somewhat rule-based.

For example, in unstructured FrameMaker, styles identify text: body text, heading1, chapter heading, and so on. Relationships in the document are apparent through page formatting, and the logical relationships are usually enforced in the editing process: the human eye confirms the body text tag is subordinate to any heading tag; a heading 2 tag is subordinate to a heading 1 tag.

Structured-based authoring depends on elements. Hierarchically organized elements describe content. The file defining these elements—either a document type definition (DTD) or a schema—enforces the relationships. For example, if the DTD or schema does not allow for the inclusion of more than one <Para> element within an <Intro> element, users cannot insert a second paragraph in this element. If they attempt to break the rules established in the DTD, their document bleeds red and does not validate. For organizations following a strict structured workflow, an invalid document adversely affects the final output.

FrameMaker is not a native XML editor, but it does allow you to generate XML output. In place of the DTD or schema, users create an element definition document (EDD), which defines every element allowed in the document.
tools of the trade

For example, Figure 1 displays the `<Intro>` element as seen in the FrameMaker Structure View window, along with two `<Para>` child elements. The `<Intro>` element legally contains the two `<Para>` child elements because the EDD associated with this document (shown in Figure 2) allows for a maximum of two `<Para>` child elements in the `<Intro>` container element. The EDD also allows the user to include a `<Note>` child element, but the question mark indicates that, in addition to the one element outside the parentheses, no more than one instance of the elements included in the parentheses is allowed. If the writer adds a `<Note>` element or another `<Para>` element to the existing structure, he violates the rule established in the EDD, and instead of a solid black line connecting the elements, a broken red line appears, flagging the violation as shown in Figure 3.

EDDs and DTDs are addressed in more detail in the Getting Started section of this article.

**Timing Is (Almost) Everything**

Move to structured authoring if the change helps maintain or improve efficiency. If existing projects require the maintenance of several documentation sets, many with overlapping content, and using conditions is either not an option or is already taxed to the limit, it is time to consider a new authoring approach.

For example, at the start of 2004, using the standard version of FrameMaker, my company hit the conditional text ceiling. The new generation of products required our documentation projects to grow, and the new growth proved too large and complex for standard FrameMaker. Existing projects depended on more than thirteen different conditions, and the increasing demand for customized documentation sets guaranteed the new projects would require at least twice the number of conditional settings, a move far too messy to even consider. But we also did not want to create separate documentation sets. We were very committed to maintaining a single-sourcing workflow. Structured authoring proved a perfect solution.

**Why Structured FrameMaker?**

For my company, the decision to move to structured FrameMaker instead of a native XML editor, such as Arbortext’s Epic or JustSystems’ XMetaL, was easy. We already owned FrameMaker 7.2: the move required no additional software purchase. In addition, with the structured application feature available in FrameMaker, we have the option of generating raw XML. Granted, creating a structured application requires a good deal of extra work, but if we decide at any point we want to make the switch to a native XML editor, we can export our existing documentation set from FrameMaker to XML and proceed using our new authoring tool.

In addition, although we place a growing emphasis on our HTML-based help file, clients love the fact that we provide quality PDF versions of our user guides, and FrameMaker remains the best tool on the market for PDF output. In the end analysis, FrameMaker provides us the best of both worlds: we can create structure-based documentation sets that allow us to expand our documents and keep up with ever-growing content, and we can generate superior PDF versions of our help.

**Why Structure?**

As I just mentioned, structured authoring accommodates growing documentation sets. The expandable nature of structured elements allows an element to house more than just a name. Specifically, elements can include attributes, and attributes offer endless growth opportunity.

Attributes add information to the element. In structured FrameMaker, attributes can be used in place of conditions. We use attributes to identify output—
print, online, hide—and we also have a number of attributes that identify content used in overlapping products. For example, a document intended for use for three different products—A, B, and C—includes sections specific to only products A and B.

In structured FrameMaker, an attribute can marry products A and B’s content—an “AB” attribute. Writers can then assign this attribute to sections specific to the A and B products. When the content is filtered, before generating the final output, the tagged sections appear in the A and B documentation but not the documentation for C.

Figure 4 includes three attributes defining two different <Para> elements. The first <Para> element includes a “Product” attribute identifying the content as specific to product “C.” The second <Para> element includes a “Product” attribute identifying the content as specific to products A and B (an “AB” attribute). Both <Para> elements include “Version” attributes identifying the content as specific to product version “1.5” and “Output” attributes identifying the content as “Print.” Output can be filtered based on any or all of these attributes.

Structured FrameMaker accommodates a limitless number of attributes, and managing attributes in the structured view is much easier than trying to juggle large chunks of conditions within documents, especially overlapping conditions. Attributes can be added as needed to the EDD.

One final and very attractive reason to consider structure: XML is platform- and vendor-neutral. Once documents are moved into a structured environment, content can be exchanged between incompatible applications, allowing users to move between authoring tools with relative ease.

Training
Implementing a structured workflow is difficult and professional training a must. To save money, larger documentation teams may want to consider training only a few writers. Make sure participating writers are committed to the process and excited about the change.

Figure 4. Element attributes show which products will include those elements.

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When selecting a structured authoring group, designate a clear project lead. The lead should be at the very least familiar with the structured authoring theory, and be able to provide background information and pretraining assignments to the other members of the team. All involved must understand what structured authoring is and why the change is necessary before beginning formal training.

If possible, do some training before the professional training begins. A month or two before the class starts, purchase copies of the workbooks or other documentation, and require all participants to work through at least the beginner’s material.

**Getting Started**

Once training is complete, don’t wait too long before taking the steps necessary to implement a pilot project. Planning meetings need to start within a few days of completing the training, while the new information is still fresh.

No one-size-fits-all implementation scenario exists when trying to employ a structured authoring workflow, but following are a few preliminary steps to consider.

**Analyze current content.** Identify the content elements to include in the EDD or DTD. For example, to generate book output, start by identifying the necessary top-level elements, such as “Chapter,” “Appendix,” and “Glossary.”

**Identify content reuse areas.** Knowing the areas of overlap helps determine attributes needed in the EDD or DTD or areas for which text insets may be created.

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**Files Needed for Structured FrameMaker**

- **EDD (Element Definition Document):** Specific to FrameMaker, an EDD is the structured file template. It defines the element catalog and the element relationships. Before creating an EDD from scratch, investigate existing options—for example, DocBook or DITA. Make sure to test the EDD before making it available to users, and use only one EDD for all documentation to avoid confusion and streamline the updating process.

- **Formatting Template:** This template defines all formats intended for use in the documentation. Formatting information can be embedded in the EDD; however, organizations already using a formatting template in unstructured FrameMaker can save a good deal of time by using the same template for structured FrameMaker. A few edits are required to get it to work in structure, but the changes are minor when compared to the effort involved with trying to embed formats in the EDD.

- **DTD (Document Type Definition):** Required to generate XML from FrameMaker, a DTD defines the element names, valid content, and attributes. The DTD is needed to process XML and create useable output. It defines what is legal in an XML document. FrameMaker can create a DTD using an EDD or vice versa, but the DTD file does not contain formatting information.

- **Read/Write Rules:** Also required to generate XML from FrameMaker, this file contains the mapping rules, which control how XML is exported from structured documents.

- **Structured Application Definition Document:** The Structured Application Definition Document is required to generate XML from FrameMaker. This document stores application settings, such as the application name and the location of the files included in the structured application.

- **Structured Application:** The Structured Application is required to generate XML from FrameMaker. The application is a collection of files defining how to translate the XML (DTD, Read/Write Rules, Formatting Template).

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Consider legacy documents. Organizations with large libraries of existing documents may want to consider starting new with the next generation of help. For example, my company had hundreds of files in unstructured FrameMaker, and we decided it was not worth our time to convert them to structure. Instead, when the development team started work on the next generation of products, we followed the new products with an entirely new documentation library using structured FrameMaker. We still maintain all legacy documents in unstructured FrameMaker. Working in the structured and unstructured environments simultaneously is easy; the software allows writers to switch effortlessly between the two authoring styles. For content that must be converted, conversion tables in FrameMaker can automate a good deal of the task, but you’ll also need to consider the following:

- Creating conversion tables is difficult and requires a solid understanding of structured FrameMaker and the existing documents.
- The best conversion candidates include documents created using a style-based authoring tool.

**Determine documentation design.** This is
especially important if more than one writer works on a project. A solid design helps ensure consistency between writers and projects. Some issues to consider addressing in the design include the following:
• How to begin a procedure; how to end a procedure
• How to place graphics
• How to handle field definitions

Determine how to generate final output. A number of options are available for generating output. For example, we use Quadralay’s WebWorks ePublisher Pro, which converts source documents authored in FrameMaker (and other popular authoring tools) to a variety of end-user formats, such as HTML or CHM. Because we already owned WebWorks and planned to continue with this part of our workflow, there was no need for us to create a structured application to convert our FrameMaker content into XML. If, while planning output needs, XML output is required, allow for additional time (and maybe training) to create a structured application.

Create the necessary files. See the sidebar for a list of the files you’ll need to create.

Select a small pilot project. The pilot project provides a nice testing ground for the new EDD. The ideal project will use a wide variety of elements. For example, if the EDD includes table and note elements, make sure to select a pilot project that includes tables and notes.

Generating Output

When working in a structured environment, you have a number of output options. This article examines two options popular with FrameMaker: FrameMaker to XML and FrameMaker to WebWorks ePublisher Pro.

FrameMaker to XML

Moving from XML to any useable output requires more work. For example, getting HTML from the raw XML generated by FrameMaker usually involves creating XSL (extensible stylesheet language) files and installing an XSL processor, such as Saxon.

When FrameMaker files are converted to XML, all content and markup information in the files is included in the XML. Nothing filtered in FrameMaker affects the XML. All elements, whether they are tagged for “Print,” “Help,” or a specific product, are included in the raw XML. So generating HTML help-only output requires the creation of XSL files that include commands instructing the XSL processor to ignore all content identified as “Output = Print.” Once the XSL files are in place, everything is sent through the XSL processor, which generates the final output.

This output option requires no expensive third-party help tool, such as WebWorks ePublisher Pro or Adobe’s RoboHelp. XSL files can be created using any of a number of tools. XSL is just text, so any text editor—Notepad, TextPad, UltraEdit—will do. Or, to avoid typing errors and ensure the XSL is properly structured, XSL editors, such as eXcelon Stylus Studio or Marrowsoft XCELERATE, are available and relatively inexpensive (a few hundred dollars per license). The XSL processors are open-source tools and downloadable for free.

Although moving from FrameMaker to XML to the final output may sound attractive from a cost standpoint, creating XSL files is difficult and requires additional, and costly, training.

FrameMaker to WebWorks ePublisher Pro

To avoid creating the structured application in FrameMaker and working with raw XML, third-party help tools provide a nice but relatively expensive alternative. My company already owned WebWorks ePublisher Pro licenses, so we were in a comfortable position. We did not have to decide between creating rather complex conversion files (XSL) and purchasing a new expensive tool.

With WebWorks, as with most help tools, content is filtered in FrameMaker and imported into WebWorks. A stationery, or template, created in WebWorks defines how the output looks. The biggest hurdles with this option—beyond paying for the help tool—are creating the stationery and filtering content in FrameMaker (for users working in a 7.x version of the software).

Thanks to WebWorks’s user-friendly interface and GUI-based customization options, creating a simple stationery is not difficult and can be accomplished in a few days with no formal training. Once created and saved, the stationery can be used in future projects.

For FrameMaker 7.1 and 7.2 users, the biggest challenge involves filtering content before sending it to the help tool. Although these versions of FrameMaker allow for structured attributes, neither version accommodates attribute-based filtering. The best solution for this problem is a third-party plug-in. The free plug-in ABCM (previously Sourcerer) allows users to show and hide information based on attribute values. Adobe addressed the filtering problem in FrameMaker 8, which supports attribute-based conditions. Users of FrameMaker 8.x don’t need to install the plug-in.

The Long View

Moving from an unstructured workflow to structured authoring is a long and rather complicated process, but for documentation teams bogged down with overlapping content and cut-and-paste workflow solutions, the move will prove beneficial in the end. To ensure a smooth transition, implement the changes slowly. With good planning, a successful pilot project can be in place twelve to eighteen months after initiating the implementation plan.

A technical writer with Blackbaud for nine years, Denise Kadilak (denise.kadilak@blackbaud.com) has presented on topics such as structured authoring and indexing at local STC meetings and the international conference. She has also published an article in Intercom on indexing and regularly contributes book reviews to Technical Communication.
Meetings

By Geoffrey J. S. Hart, Fellow
Get Buy-in and Support

Most of your colleagues, scarred by years of tedious, ineffective meetings, will go to great lengths to escape them. (I’ve even heard of people who would arrange to be paged so they had a plausible excuse to leave a few minutes into the meeting.) But if a meeting is important, everyone needs to take it seriously. Managers must make clear to their staff that participation isn’t optional. If the managers don’t believe the meeting is important, neither will their staff, and you can pretty much forget about trying to force them to attend. You may be able to sweet-talk some into attending, but you’ll need to be substantially more persuasive than if you have management support.

Persuasion becomes much easier if you establish a reputation for running effective, relatively painless meetings. But until you have that reputation, you’ll need to convince people to trust you. Start by making the meeting relevant to everyone who must attend. Too many meeting organizers invite everyone who might conceivably have an interest in the subject instead of focusing on the key players. It’s easier to keep the meeting short and focused if you invite only those who must be present. Ensuring that all voices are heard and that everyone has a say in the decisions is important, but often it’s more efficient to hold a smaller meeting that lets the true experts create something the rest of the stakeholders can review.

But if real-time discussion, interaction, and consensus are truly necessary, only a meeting will do.

Tips for More Productive Meetings
Pick a Suitable Date and Time

Unsuitable choice of a date and time is a major cause of poor attendance and lack of participation. Inform the key people of the need for a meeting as far in advance as possible. For regularly scheduled meetings, the interval between meetings is clear, and you can start out by asking all participants when they expect to be unavailable. Once you’ve ruled out these periods, try to arrange a time for the next meeting during the current meeting, while everyone is present and able to discuss alternatives: that way, monthly meetings can be arranged one month in advance and weekly meetings one week in advance. This also offers participants a chance to warn you of commitments such as vacations that will prevent their attendance and to ask others for a compromise date.

For ad hoc or unexpected meetings, provide as much warning as possible. When you announce the meeting, offer a range of dates and times that are best for you, and ask people to confirm their preferences. (Most office software, including Microsoft Exchange/Outlook, offers a group scheduling feature that makes this easy; it examines the personal calendars of everyone you want to invite and helps you eliminate obvious scheduling conflicts.) Pick a date when most participants (or all of the most important ones) will be available. Some negotiation may be necessary, or you may simply have to pick a date that will allow the most important people to attend, then find a way to obtain input from anyone who can’t attend on that date.

Well before the meeting, send out a reminder and an agenda. For a regularly scheduled meeting, try sending the reminder around half to two-thirds of the way to the next meeting. For example, reminders for a monthly meeting could go out one to two weeks before the meeting. For an ad hoc meeting, try to give at least one day’s notice. Ask whether anyone’s plans have changed (often through no fault of their own), and if so, ask them to provide their inputs in writing or in person (talk to them at lunch, for instance) before the meeting. If you’re in an uncommonly busy workplace where chaos reigns, or if you’re dealing with unusually recalcitrant colleagues, consider sending out another reminder the day before the meeting. Not everyone is diligent about adding such appointments to their calendar software and setting the reminders function, and over time you’ll come to know who needs help remembering. Add a note on your own calendar to provide that help instead of bothering everyone on the list with unnecessary reminders.

There are never any guarantees, but letting participants exclude times when they know they won’t be available, and giving them alternative ways to participate if they can’t attend, greatly increases participation.

Provide Support Materials and an Agenda

To help maintain focus, ensure that everyone receives the supporting information they’ll need to participate effectively, well in advance of the meeting. This material might be a budget report, a link to a Web site, or the latest build of the software you’re documenting. Your goal is for everyone to come to the meeting already well-informed about the subject. Nothing is more frustrating and inefficient than asking people to reach decisions at a meeting before they’ve had time to digest the background information. Except in emergencies, it’s rarely necessary to extensively discuss support materials at the meeting; it’s more effective for everyone to read them and form opinions beforehand. Provide incentives such as including particularly good contributions to meetings in annual performance appraisals to encourage participants to do their homework. Don’t waste time providing a detailed recap for people who can’t be bothered to inform themselves before the meeting. Offer a brief summary, and if they demonstrate serious ignorance of the subject, ask them not to participate in voting or waste everyone else’s time with ill-informed speculation.

Create an agenda, and distribute it before the meeting so everyone has time to think about it and do any necessary research. Stick to your agenda rigorously unless something truly special arises. If something must be added to the agenda at the last possible instant, think hard about whether you can productively discuss this new issue at the meeting or whether everyone needs time to think about it first. It’s generally more effective to briefly introduce the topic, ask everyone to think about it, and arrange a separate meeting to discuss it. If a point is so minor that it doesn’t require much thought or research, add it to the list of additional topics that will be discussed at the end of the meeting—and discuss it then only if time permits. Try to end the meeting on time, because most participants will have scheduled other tasks they must begin as soon as the meeting ends.

Most meetings will have a defined time slot, and you won’t have the luxury of prolonging the meeting. To complete meetings on time, you’ll need to create a time budget. If all topics are equally important, simply divide the available time equally among the topics; if some topics are more important than others, allot them proportionally more time. Then keep an eye on your watch to ensure that each discussion ends on time. A few minutes before the time runs out, try to gently direct the discussion to a conclusion, and spend those last few minutes achieving consensus. If the issue proves far more contentious than you expected and clearly can’t be resolved in the remaining time, decide whether the topic is sufficiently important to use.

To complete meetings on time, you’ll need to create a time budget.
up the remaining time (thereby forcing another meeting for the remaining topics), or whether the discussion should be stopped and continued at another meeting.

When VIPs are in attendance, keeping a meeting on track can become quite difficult—particularly with the kind of folksy manager who takes pride in having the common touch and wants to chat with everyone. As chair, it’s your job to manage the discussion, and some VIPs aren’t accustomed to being managed by their juniors. You may be forced to “pull rank” and tell someone that you don’t have time to discuss their point, interesting though it may be, and that it will have to be deferred to the end of the meeting or form the topic for another meeting. This takes considerable diplomacy, so don’t even think of trying it if you don’t know the managers well enough to predict their reaction or don’t have enough credibility to make them listen.

The purpose of a meeting is to reach one or more decisions, so design the meeting agenda specifically to lead towards those decisions. Other agenda items can be handled if time permits, but if not, ruthlessly exclude them from the agenda. Then ensure that the necessary decisions get made before anyone leaves.

Summarize the Consensus

Remembering everything that has been said and what has been decided can be difficult. To ensure that everyone is on the same wavelength, pay attention to the flow of the discussion, and when nothing new seems to be added, gently interrupt and summarize what you feel to be the consensus opinion. Ask for confirmation that you’ve gotten it right, and provide one more chance for correction or addition to that consensus. Unresolved issues may not be resolvable in the time remaining, but should be recorded to serve as the basis for future discussion. Then write down the consensus and summarize what remains to be done.

If actions must be taken, assign responsibility for completing them to whoever is best suited to do so. Then negotiate a fair deadline. Make sure that the criteria for successful completion of an activity are clear, and write down that information too. If a follow-up meeting is necessary, try to arrange it now, while everyone is available. Some follow-up meetings will require the full group; others will require only a subset of the group. Find out which is correct, propose that to the assembled participants, and once you’ve received their approval, make the necessary arrangements for that sub-group.

Whether you take notes (minutes) yourself or have an elected secretary, summarize one more time before you close the meeting, just to be sure that nothing has been missed or misunderstood. Then be sure to send out a copy of the minutes, with action items highlighted, within a day of the meeting, while memories are still reasonably fresh and before anyone gets too busy with other new responsibilities.

Consider Chairing the Meeting

Thus far, I’ve assumed that you’re the person who arranged the meeting. More likely, someone else will have arranged it—someone who hasn’t read this article. If the meeting is important to you, it may be worth your while to offer to chair the meeting and make the necessary arrangements. Few people enjoy chairing meetings, and those who don’t will appreciate those who offer to relieve them of this responsibility. It’s a great opportunity to earn a bit of gratitude and demonstrate your management and people skills to managers.

If the person declines your offer but clearly doesn’t know the first thing about running a meeting, you can choose to suffer in silence, or you can risk trying to act on some of the abovementioned tips in your role as a meeting participant. Again, you have to know your audience. Some chairs will appreciate this, but others will take it as an assault on their authority. If you don’t know the chair well, try speaking up and watching their reaction. For example, if a chair seems unwilling or unable to stop a discussion that is going around in circles, you could say, “It seems like we’ve got consensus on this issue. Does everyone agree that ...?” If you receive a cold look from the chair, you’ll know it’s wiser to sit back and suffer in silence.

Obvious? Not!

You’d think that all this is obvious, but in nearly twenty years of workplace experience, I’ve come to realize that perhaps it’s so obvious that everyone misses what lies right in front of their collective nose. You can find many formal rules for running meetings, including Robert’s rules of order (en.wikipedia.org/wiki/Robert%27s_rules_of_order). Most of these more formal guidelines only codify some of what I’ve already said and provide support that lends authority to your role when you need it. Ideally, you should be able to run a meeting without relying heavily on “rules.” If you create an atmosphere that encourages interaction and consensus, you won’t have to worry about wielding the rules.

Of course, all of this advice has to be practiced. You can learn much more about making meetings effective, particularly with respect to the human dynamics, by actually arranging and chairing meetings than you can learn by reading alone; thus, I encourage you to find time to manage an occasional meeting. If you’ve never been asked to chair a meeting, look for ways to add this experience to your portfolio. For those of us who work with subject matter experts, one good tactic is to offer to serve as secretary at someone else’s meeting. This lets you do simple things such as calling for consensus (“I’d like to write down a correct interpretation. Do we all agree that...?”) and scheduling the next meeting. If you’re seen as someone who adds value to the meeting, you’ll be invited back, and over time, may be assigned other influential duties. That’s not just theory; many years back, I served as the secretary for a government health and safety committee, and within a year, found myself chairing that committee.

Contact Geoffrey J. S. Hart at ghart@videotron.ca.
Philadelphia Dining and Nightlife Offer Something for Everyone

By Gary Sternberg, Senior Member

Philadelphia, in addition to being a city with numerous historical treasures, is a modern city with a dynamic dining and nightlife scene. Numerous restaurants abound within walking distance of the Pennsylvania Convention Center, site of the 2008 Technical Communication Summit. There are fine dining experiences, cheesesteaks, and everything in between. You can also go to a concert, go club hopping, catch a show, or take in a ball game. There’s something for everyone in Philadelphia!

Dining Near the Convention Center

Chinatown is next to the Convention Center and is obviously a great place to enjoy a meal. That is particularly so for large groups looking for something reasonably priced. There are dozens of great restaurants within a few blocks. Sang Kee, Joy Tsin Lau, Ly Michaels, Ocean Harbor, Four Rivers, and Harmony Vegetarian are just a few.

But you can get a lot more than just Chinese food in Chinatown. Siam Cuisine and Taste of Thailand offer Thai food; Vietnam Palace, Hoa Viet, and Capital Vietnam provide Vietnamese cuisine; Penang and Banana Leaf Malaysian feature Malaysian fare; and Rangoon provides Burmese food.

A few blocks from the Convention Center is the Independence Brew Pub, a microbrewery with good food. Maggiano’s, an Italian chain that specializes in family-sized platters, is also good for groups.

For lunch, the Reading Terminal Market across from the Convention Center is an absolute must. The market, opened in 1893, is a veritable bazaar of eateries. If you want to sample a cheesesteak, grab one at Carmen’s or a number of other places. For hoagies (known elsewhere as subs), get an Italian at Spataro’s. DiNic’s offers pork or beef sandwiches with provolone and roasted peppers. There are also stands that sell vegetarian food, Pennsylvania Dutch delicacies, southern cuisine, Mexican food, crepes, seafood, kabobs, and much more—not a single national chain among them!

Other Dining

Within easy walking distance of the Convention Center, the Old City historic district has been experiencing a restaurant renaissance for years. Buddakan, an Asian fusion restaurant, is one of the most popular. The City Tavern is a true experience, where the décor, colonial garb of the wait staff, the menu, the drinks, and even the table settings all evoke the ambiance of an eighteenth-century tavern. Old Original Bookbinder’s is a classic seafood restaurant. Amada is a Spanish restaurant offering tapas and paella.

“Restaurant Row” on Walnut Street includes Le Bec-Fin, one of the highest rated restaurants in the country (and
most expensive—a meal for one will be at least $100). For a less pricey option, you can try Brasserie Perrier, which shares the same owner as Le Bec-Fin but not the prices. Nearby are the Il Portico Ristorante and the Striped Bass (where Bruce Willis dined with his wife in the movie The Sixth Sense). A few blocks west is Rittenhouse Square, featuring such excellent restaurants as Friday Saturday Sunday, the Devon, Monk’s Café, and Eulogy Belgian Tavern.

A quick cab ride away is South Philly, which features dozens of terrific Italian restaurants, as well as Pat’s, where the cheesesteak was born in 1930, and Geno’s, which many locals consider just as good as, if not better than, Pat’s. There are too many excellent Italian restaurants in South Philly to start naming them. However, one of particular note is Victor’s Café, where the wait staff are also classical music students who frequently interrupt meals to burst into an aria.

Nightlife
Philadelphia has a vibrant nightlife, with a wide range of activities within walking distance of the Convention Center. Whether you want to go club hopping, hear some music, catch a foreign film, or just relax with a cocktail, Philly has it all.

Old City is particularly hopping at night. The Continental Restaurant and Martini Bar offers an extensive martini list, while Cuba Libre offers not only fine Cuban cuisine but a rum bar with more than sixty varieties. The Plough and the Stars is a traditional Irish pub, while the Tin Angel (www.tinangel.com) and Khyber Pub (www.thekhyber.com) offer live music. Dance clubs such as Glam and Shampoo (www.shampooonline.com) offer nonstop entertainment.

The Kimmel Center and the Academy of Music on the Avenue of the Arts present classical music events. A block away from the Convention Center is the Trocadero (www.thetroc.com), one of the many live venues offering punk and similar types of sounds. Zanzibar Blue (www.zanzibarblue.com) and the Clef Club provide live jazz.

Philadelphia has a number of theaters. Of particular note, the Walnut Street Theatre—America’s oldest theater, founded in 1809—will be in the middle of its run of Les Misérables during the conference, and tickets can be obtained at www.walnutstreettheatre.org. If it’s cinema you’re interested in, the Ritz theaters offer independent and foreign films on more than a dozen screens at three different locations in Old City.

A real treat is South Street, which is on the fringe of Center City both physically and spiritually. This is probably the most eclectic street in town, with all kinds of unusual eateries, clubs, and shops.

Want to catch a baseball game at the relatively new Citizens Bank Park (which opened in 2004)? You’re in luck! During June 2–4, the Phillies will be hosting the Cincinnati Reds, all games starting at 7:05 PM, and the ballpark is just an easy subway ride away. The Phils will also be playing a day game on Sunday, June 1, against the Florida Marlins. You can get tickets in advance at www.phillies.com.

Clearly, there’s something for everyone in Philadelphia, and you’ll have no problem finding things to do when the conference sessions end each day. A terrific Web site to find out what’s happening is www.gophila.com. Reservations are recommended for the nicer restaurants, and you can find the Web sites for just about all the restaurants mentioned here by consulting this article’s sidebar or by googling the name of the restaurant and including “Philadelphia.” At the conference itself, the Philadelphia Metro Chapter STC will be staffing a hospitality booth.

Hope to see you at the conference!
U.S. Members: Deduct Your STC Dues

If you pay taxes in the United States, keep in mind that STC dues are tax deductible. Please note, however, that dues must be deducted from the tax return filed for the year in which they were paid. In other words, dues paid in 2007 may be deducted only from 2007 tax returns. Therefore, if you paid your 2008 dues on or before December 31, 2007, these dues can be deducted only from your 2007 return. Members who have questions should contact their local IRS office or their accountant.

You can claim dues as a deduction in one of several ways: as a charitable expense, a business expense, or a miscellaneous deduction.

Charitable Expense
All STC members who pay taxes in the United States can deduct at least a portion of their STC dues if they claim this portion as a charitable donation. IRS publications 526 (rev. 2003) and 17 define this option:

You may be able to deduct membership fees or dues you pay to a qualified organization. However, you can deduct only the amount that is more than the value of the benefits you receive.

As a 501(c)(3) organization, STC is a qualified organization. To determine the amount of charitable contribution you may claim, subtract the cost of tangible benefits you receive from STC from the amount of dues you paid in 2007. STC’s tangible benefits can be estimated at $30 per year: $15 for the Society’s quarterly journal, Technical Communication, and $15 for the magazine, Intercom.

STC’s prorated dues system, as well as the different membership categories, might affect the amount of charitable contribution you may claim. When calculating your charitable contribution, consider the following factors:

For 2008 Dues
If you pay your 2008 dues on or before December 31, 2007, you can claim them as a deduction on your 2007 return. The amount of your dues for 2008 depends on the membership category you select: classic, student, or e-membership.

Classic members determine their charitable contribution by subtracting the cost of tangible benefits ($30) from the cost of dues ($175 for classic members). Because student members and e-members do not receive printed versions of Technical Communication or Intercom, they do not receive tangible benefits, and may deduct the full amount of dues for 2007: $165 for e-members and $60 for student members.

Some members also receive prorated credit, based on the month they joined STC, that decreases their 2008 dues.

Business Expense
Employers and self-employed consultants may claim the full amount of dues as a business expense.

Miscellaneous Deduction
Those who do not fall into the categories defined above may claim the full amount of dues as a miscellaneous deduction. (For miscellaneous deductions to affect taxes, the total amount of miscellaneous deductions must exceed 2 percent of your adjusted gross income.)

Money, Not Time
Please be aware that, while dues, contributions, and out-of-pocket expenses may be deducted, personal services may not.

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March 14 & 15
Southern Polytechnic State University
Marietta, Georgia

March 14 Workshop
Visual Structure
With Jean-luc Doumont
Group discussion and interactive analysis of sample presentation slides, page layouts, and Web pages submitted by workshop participants

March 15 Conference
Sessions (including “Road Signs: Finding your way in the Visual World” by Jean-luc Doumont), Keynote address by Mark Clifford, STC First Vice President Industry leading vendor exhibits, on-site technical bookstore, and door prizes

info & registration
stcatlanta.org
Membership Categories for 2008

The following are descriptions of the membership categories offered to STC members for 2008. Please note that under the new dues structure approved by the Board of Directors in August 2007, the cost of each additional chapter membership (beyond what is included in a member’s respective membership package) is $25 per year, and each additional special interest group (SIG) membership (beyond what is included in a member’s respective membership package) is $10 per year.

Classic Membership
Classic membership entitles members to the hardcopy versions of Intercom and Technical Communication and access to their online versions, as well as full access to the online STC members-only knowledge base. Members in this category may choose one of the following community options for 2008: one chapter and one SIG, or up to three SIGs. Members in this category may join additional SIGs at a cost of $10 per SIG and additional chapters at a cost of $25 per chapter.

E-Membership
E-membership entitles members to the same benefits as classic membership, except that e-members do not receive hardcopies of Intercom and Technical Communication. Members in this category may choose one of the following community options for 2008: one chapter and one SIG, or up to three SIGs. E-members may join additional SIGs at a cost of $10 per SIG and additional chapters at a cost of $25 per chapter.

Student Membership
Student members receive the same benefits as e-members, but have no voting rights. In addition, student members may join up to three SIGs and up to two chapters (one student and one professional). Students may join additional SIGs at a cost of $10 per SIG and additional chapters at a cost of $25 per chapter.

All SIG Membership Package
In addition to these membership categories, as part of a one-year pilot program, STC members have the option of joining all of STC’s twenty-one SIGs at a reduced rate. For $300, in addition to membership in all SIGs, members will receive membership in one chapter and printed versions of Intercom and Technical Communication. This rate includes overseas postage for international members.
Details are available on the registration/renewal section of the STC Web site at www.stc.org/membership/join01.asp.
Recommend Candidates for 2009 Honorary Fellow

The Society for Technical Communication established the rank of Honorary Fellow to recognize persons who are not members of the Society but who have achieved eminence in the field of technical communication. Past Honorary Fellows include Simon Singh (2007), Vinton Cerf and Robert Kahn (2006), Felice Frankel (2005), and Maxine Singer (2004).

The Honorary Fellows Nominating Committee asks for your help in identifying candidates for Honorary Fellow for 2009. Please read the criteria and procedures below and send your recommendation to the postal or e-mail addresses at the end of this article.

Criteria

The committee assesses each candidate based on the following criteria:
1. Public and professional reputation. The candidate should have wide recognition among STC membership and the educated public.
2. Level of contribution to the advancement of technical communication.
3. Professional activity in other fields, such as natural, social, or physical sciences; journalism; engineering; or information technology.
4. Number of years of experience in the field (at least ten years).
5. Professional qualifications: technical, scientific, managerial, academic, or other.
6. Caliber of publications.
7. Exceptional activities that have benefited the field of technical communication.

Procedures

Only the STC Honorary Fellows Nominating Committee may nominate an individual for the rank of Honorary Fellow. While application for this rank is not permitted, the committee welcomes recommendations from any member of the Society. To recommend a candidate, send the committee a letter or e-mail, accompanied by verifiable biographic data, including achievements in and contributions to the field of technical communication. Please address as many of the qualifying criteria as you can. The information you provide to support your candidate will help the committee consider all candidates fairly and responsibly.

It is important to remember that the nomination of an Honorary Fellow is a confidential matter between the Board of Directors and the nominee. Do not approach proposed candidates to assess their willingness to be nominated or to collect biographic information. Normally, only one nominee is elected each year; therefore, discretion must be exercised for the sake of both the candidates and the Society.

Contacts

The current committee members are as follows:
Beth Tanner (chair), Associate Fellow, Middle Tennessee chapter
Andrea Ames, Fellow, Silicon Valley chapter
Dana Chisnell, Fellow, San Francisco chapter
Alison Reynolds, Senior Member
Ed See, Associate Fellow, Marketing Communication and Usability & User Experience SIGs

To recommend a candidate, please send a letter or e-mail, posted no later than March 30, 2008, to this address:
Beth Tanner, Chair
Honorary Fellows Nominating Committee
58 Lindsley Avenue
Nashville, TN 37210 USA
beth@tannercorp.com

STC Election

The STC election is scheduled to begin March 12 and end April 14. In March, voting instructions and ballots will be mailed to members who selected this option on their 2008 applications and renewal forms. Other members will be e-mailed instructions for accessing the online ballot.

Please note that STC’s new bylaws, recently adopted by the membership, no longer require the officers of STC’s presidential chain of succession—our incoming president and incoming first vice president—to stand for election. Therefore, First Vice President Mark Clifford and Second Vice President Cindy Currie will not appear on the ballot this year. If you have any questions about this change, please contact Suzanna Laurent, manager of STC’s nominating committee, at slaurent@prodigy.net.

Filling Vacancies

To fill the vacancies on the Board of Directors caused by the mid-term resignations of STC directors Jeff Staples and Mike Murray, members will elect five directors in this year’s election. The top three vote-getters among the director candidates will serve full three-year terms (from June 2008 through May 2011). The candidates receiving the fourth- and fifth-highest numbers of votes will serve the remainders of Staples’ and Murray’s terms (until May 2009) and will be considered for placement on STC’s 2009 preliminary slate of candidates.

Candidates for 2008

The candidate information page for STC’s 2008 election is now live on the STC Web site at www.stc.org/candidatesFAQ. From this page, you can access candidate biographies and ask questions directly of candidates. Excerpts of the candidate biographies will appear in the March issue of Intercom.
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Conference Lodging

Be sure to make hotel reservations at STC’s official conference hotel, the Philadelphia Marriott Downtown (www.marriott.com/hotels/travel/phldt-philadelphia-marriott-downtown; +1 215-625-2900) to ensure that you stay at the hotel with which STC has a contract. By booking a room at the Marriott, you will also help STC avoid paying penalties (attrition). Hotels penalize for rooms blocked but not used. This can take the form of an actual cash penalty for STC or a loss of STC’s credibility to hold enough rooms for future meetings. STC works hard to negotiate the best rate available at the hotels most convenient to the annual meeting facility. That way you will have the best annual meeting experience possible and facilitate networking with your peers. Please help the Society help you by reserving a room at the official conference hotel.

Cost for a single or double room is U.S. $218 per day plus tax.

Early Bird Rates Expire March 17

Register by March 17, 2008, to receive the early bird rates for the 2008 Technical Communication Summit. Registration is available online at www.stc.org/55thConf, as well as by fax and mail.

The Early Bird rates offer significant savings:

- Member early bird rate: $695—a savings of $300 off the on-site rate
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- Student early bird rate: $175—a savings of $75 off the on-site rate
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Beyond the Bleeding Edge

This column discusses new technologies that may affect technical communicators in the near future. If you have feedback or want to suggest topics for subsequent columns, please contact Neil Perlin at nperlin@concentric.net.

Neil E. Perlin, Column Editor

Accounting 101: To the Bleeding Edge by the Numbers

By Neil E. Perlin, Associate Fellow

Accounting isn’t on the bleeding edge, but it will help us get there.

Think of the trouble you had getting approval for a mere $800 for a copy of FrameMaker. What’s it going to be like when you ask for $25,000 for that content management system you need for your new single-sourcing effort? That’s where accounting comes in, helping you buttress your requests by cost-justifying them in a language that a chief financial officer (CFO) wants to hear—numbers based on traditional accounting and finance principles.

Many people think of accounting as being arcane, nitpicky, and dry, and it often lives up to that reputation. For example, a big issue several decades ago was how to account for the depreciation of an apparently undepreciable asset like software (in the days when computers were just coming into use in business). A common issue today is whether to use LIFO (last in, first out) or FIFO (first in, first out) to calculate cost-of-goods-sold in inventory accounting. Arcane, nitpicky, and dry topics…but millions of dollars may depend on the answer, making such topics very interesting to a lot of people. (See the sidebar for a quick explanation of LIFO and FIFO.)

At a high-concept level, however, accounting has three very simple and useful premises—how much money do we have, where did we get it, and where is it going?

If we cannot quantitatively justify our proposals in the language that management is looking for, we will lose out to people who can.

Technical communicators rarely have to work at the LIFO vs. FIFO level of detail unless they’re documenting accounting software (something I did for several years because I have an MBA in accounting). Understanding a few basic concepts may be enough to get you into the habit of looking at the financial aspects of your projects, which will in turn start to raise the doc group’s business credibility.

Introducing those basic concepts is part one of this two-part column. Part two will look at the issue of cost-justification in general and for technical communicators in particular.

Double-Entry Bookkeeping

This always sounds illegal, but it simply means that any financial transaction affects two accounts and should be recorded that way. For example, let’s say a client pays your invoice. Your Cash account balance goes up and your Accounts Receivable account balance goes down by a corresponding amount. Or let’s say you take out a business loan. Your Cash account balance goes up and your Accounts Payable balance goes up as well, again by a corresponding amount.

These account balance changes are referred to as debits and credits, plusses and minuses. For example, when the client pays your invoice, the payment is a debit to Cash and a credit to Accounts Receivable.

Financial Accounting

This is the practice of tracking a business’s financial activity and reporting it in financial statements like balance sheets and income statements to management and outside parties—stockholders, vendors, lenders, financial analysts, regulatory agencies, etc. Basically, this is the high-level summary of a company’s financial status and operations.

Managerial Accounting

If financial accounting is the high-level summary, managerial accounting is the low-level, day-to-day operational detail. In manufacturing, this might involve monitoring the raw material cost for product X to monitor its profitability. In technical communication, this may involve tracking production costs for hardcopy documentation to calculate how much money might be saved by moving to online. Or it might involve...
collecting data to calculate the cost of a tech support call in order to determine how much might be saved by introducing better documentation.

In essence, managerial accounting involves tracking data that the company uses to make operational decisions. Financial accounting looks at and reports on the results of those decisions.

Balance Sheet
The balance sheet is a snapshot of a company’s financial position at a specific point in time, and is one of the primary financial statements in financial accounting.

A balance sheet is basically a two-column table. The left column lists assets—cash and cash “equivalents” like accounts receivable, inventory, fixed assets like buildings and equipment, etc. The right column is broken into two parts. The top part lists liabilities—accounts payable, short- and long-term loans, etc. The bottom part lists equity, often called shareholders’ equity in publicly traded companies. Equity is what’s left over after subtracting the liabilities from the assets.

The balance sheet is officially issued at the end of a company’s fiscal year for reporting and auditing purposes, but it’s issued more often for ongoing management and analysis.

Income Statement
The income statement connects successive balance sheets—how we got from FY 2006’s financial condition to FY 2007’s financial condition, for example.

The income statement lists various types of revenues, expenses, and the resulting income. It also provides various levels of calculation, such as gross profit (revenue minus direct costs—costs specifically related to the creation of the product) and net profit (gross profit minus indirect costs—operating and administrative costs, including the cost of the doc group), interest expense, taxes, and so on.

How do these concepts fit together? Managerial accounting data support the operational decisions that generate revenues that are recorded in financial accounting reports.

Such an attitude hurts technical communicators by making us unable to participate in many strategy, policy, and operational decisions because we don’t speak the same language as the participants, especially those who control the money. If we cannot quantitatively justify our proposals in the language that management is looking for, we will lose out to people who can.

In the past, this didn’t matter much because technical communication was a fairly closed world. Today, however, single sourcing and new concepts like multichannel publishing and Web 2.0 are changing the role of documentation and increasing its visibility and financial stakes. This is attracting outside consultants who can speak CFO’ish. Being able to speak CFO’ish ourselves will help us compete for the interesting new projects, rather than just being relegated to “documentation.”

I’ll close with an idea to start developing your accounting sense and raise your credibility within the company. Why not invite someone from the finance or accounting department to address the documentation group and explain your company’s financial statements over lunch?

Next column: cost-justification.

Raising Your Credibility
Why should technical communicators as a group care about accounting? Most of us have apparently done fine for years without it. In some quarters of our profession, there’s even resistance to learning about accounting because “humanists don’t do numbers.”

LIFO vs. FIFO
The differences between the LIFO (last in, first out) and FIFO (first in, first out) accounting methods are important if your company sells commodities whose prices change. Let’s say that your company sells cocoa beans and the price has fallen from $5 per pound last month to $4 per pound this month. If you account for the cost of the beans in the order in which you received them—that is, if you used FIFO—then you’ll subtract $5 per pound as the raw materials cost, then drop that to $4 per pound once you start moving the later inventory. LIFO would reverse that. The result would affect your bottom line, since your gross profits would be higher later rather than earlier, which in turn might affect things like your company’s taxes.

Single sourcing, multichannel publishing and Web 2.0 are changing the role of documentation and increasing its visibility and financial stakes.
You Know You’re an Independent When...

BY ELIZABETH G. (BETTE) FRICK, SENIOR MEMBER

$\text{^

This morning, I was brave. I hiked alone in the foothills of the Rocky Mountains, and I didn’t know exactly where I was for almost an hour.

Now, anyone with a good sense of direction is probably scoffing at my calling myself brave, but if you knew the depth and breadth of my genetic geographical disability (I get lost in my condo development), you’d respect my initiative. Going hiking on my own was risky business, but I did use four resources: I read a map halfway through my hike; I asked directions at a crucial junction; I planned ahead and brought a backpack with extra food and water; and I “read” the topography—that is, I kept the mountains to my left (west).

Success on this hike wasn’t about my technical skills. After all, I have strong legs and I exercise a lot, so I had in place all the ability I needed to hike. Instead, my hike was safe and productive because of my “soft” skills (including my attitude and interactions).

So it is with us independents. You’ll know you’re an independent when you work hard to develop your technical “hard” skills, but you also nurture your desire and passion and a certain amount of “soft” skills: your willingness to read maps (plans), ask other independents for guidance, plan ahead to have resources on hand, and “read” the market and react appropriately.

Desire and Passion

Part of my desire and passion for being an independent is fueled by the fact that my skills don’t really lend themselves to employment as a 1099 employee. I train technical people to write better, and I don’t know of any company that has a full-time position dedicated to this (they should, but they don’t). If I want to do what I love to do and have done for thirty-eight years, I need to be self-employed. On those rare occasions (about once a decade) when I doubt my choices, I do a quick reality test and rely on faith that even my worst day as an independent is better than my best day as an employee.

Other independents tell me that they feel they can do better work from outside the corporation for various reasons: relative freedom from politics, ability to spread economic risks across companies and industry sectors, or freedom to work a flexible and unconventional schedule.

Whatever the reasons, independents need to assess their level of desire and passion and their abilities to employ the following soft skills. If you are considering self-employment, do you want to nurture these skills?

Reading Our Maps (Plans)

Employees often implement their corporation’s business plans, marketing plans, or technology plans created by upper management. Independents have to create these plans ourselves, all of them, and then implement them, often all at the same time. We usually have no training in these strategic areas, but success means being able to ask for and listen to advice, even if you don’t want to hear it. See my Intercom columns about business plans, “Business Plans Build Good Business” and “Building a Marketing Plan,” in the April and May 2004 issues.

You’ll need to set up and modify your plans with the advice of your attorney, accountant, financial advisor, bookkeeper, graphic artist, and so on. The big soft skill here is admitting ignorance and asking for help from another professional.

For example, I finally realized I had no coherent brand. I just completed a branding exercise as a part of my marketing plan by hiring my graphic artist to help me brand every aspect of my communication with the outside world. Who knew an independent would need a branding plan, let alone even have a brand?

Asking for Direction

There’s a continuum of constancy in the life of independents, one end of which is constantly reacting to the market (“I’ll do anything that makes me money”) and the other stubbornness in the face of very clear reality (“This is what I do and I’m sticking to it”). Somewhere in between lies the prudent persistence independents need, the ability to stick to a well-reasoned plan for just a little longer to see if it bears fruit. Sometimes, in the inevitable dry periods of independent life, it’s hard to stay positive. Of course, there are hard times for employees as well, but employees navigating uncertainty at least have a paycheck.

One tool I use to get me over the rough spots is my spirituality. I have to renew my faith every day that I’m supposed to be doing what I’m doing as an independent. I ask my Higher Power to show me another direction that would be more profitable; then I listen real hard and do the next right thing. In
retrospect, it’s always worked out. I can’t imagine this independent life without some sort of guiding power—it’s an intangible asset in my business.

Often, persistence means asking other humans for advice before, during, and after some phase of your plan. For example, I’m in an Executive Exchange group where I meet with eleven other CEOs monthly. We recently focused on my business, and my cohorts gave me advice that at first just seemed wrong. I am attempting to branch out into other training delivery methods, and they directed me to focus right now on my core business. After careful consideration, though, I saw why they were directing me the way they were, and I am now much more willing to move in the directions they suggested.

STC independents have a priceless resource in the Consulting and Independent Contracting Special Interest Group (CIC SIG). For a mere $10 U.S. a year (in addition to your regular membership), you’ll have access to a very helpful e-mail discussion list where you can post questions and receive answers. In addition, you can read the archives stored on our Web site. Visit the Web site at www.stc.org/membership/sig Description01.asp?ID=1.

All small businesses in America can receive no-cost or low-cost advice and guidance from SCORE ("Counselors to America’s Small Business") and your local SBDC (Small Business Development Center). You can search for these links with any browser.

Planning Ahead

If you are reading this column, you’re either an independent or want to be. You may have heard, then, that you should have six months’s living expenses in the bank, especially in the beginning. After eighteen years as an independent, I support that suggestion. It’s impossible to predict what will happen in any business, and cash reserves are great.

But planning is not just financial; you need to plan ahead for the inevitable downturns or quiet times. What will you do during those times? Market yourself? Clean your office and focus on operations? A bit of both?

Read the Topography (Market)

This is almost a painfully obvious statement: I have a greater understanding of the training market after eighteen years as an independent trainer. I’ve forced myself to learn about other businesses in an attempt to figure out how I fit in. I constantly orient myself through reading four sources of economic information: The Boulder Daily Camera, The Boulder County Business Report, the Denver Business Journal, and the Economist. (You’ll have your own local sources, of course.) I attend STC meetings, Chamber of Commerce functions, and other professional groups, constantly trying to get a bird’s-eye view of the market in general. Just as I oriented myself on the hike to the highest mountains on my left, I always try to orient myself to the condition of different market sectors, which are far more changeable than the mountains!

And it’s OK to change your plans as the market changes or as your perceptions of the market change. I can’t tell you how many times I’ve reinvented myself and my business, usually at a lean time, and it’s always scary. It’s never been immediately comfortable, yet it has always been necessary.

It isn’t our technical skills that keep us going; it’s the soft skills that will help us over the hardest parts and the steepest climbs in our independent careers. Elizabeth (Bette) Frick, the Text Doctor, teaches technical and business writing in companies and organizations throughout Denver, Colorado; across the nation; and around the globe. Her interactive classes and practical workshops help participants improve their communication skills. She holds a Ph.D. in English from the University of Minnesota. She served as president (2003–04) of the Twin Cities Chapter STC, and recently served the Rocky Mountain Chapter STC as seminar manager. You can reach her at efrick@textdoctor.com.

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Cecily Farrar, Editor
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Responses to “An Interest-ing Dilemma”

BY JOHN G. BRYAN, Senior Member

In its November 2007 issue, Intercom printed a hypothetical dilemma by Leeanne Schroer-Motz titled “An Interest-ing Dilemma.” A summary of this story appears in the box on this page; reader responses follow. The responses do not necessarily reflect the views of STC and may have been edited for length.

Dear Editor,

I certainly understand Lisa’s dilemma, but sometimes, practicality and the economic realities of supporting a family have to override a twinge of conscience. While her sympathy is laudable, she is not responsible for the people who seek financing from this lender. She didn’t contribute to their existing financial problems and won’t contribute to any problems that may arise from their dealings with this company. She didn’t create the content of the Web site, only the presentation, and she is not directly soliciting business or publicly vouching for the honesty of the company. If the customers make the required payments after gaining financing, there will be no difficulties and, indeed, the lending institution has helped them purchase a home when it might not have been possible otherwise.

Lisa’s responsibility is supporting her family, and the irony is, if she ends her business relationship with Mark and his agency, she could very well end up in a financial situation similar to that of the people she feels the need to protect. Because of her status as the breadwinner for her family, it would not be wise for her to sever ties with Mark’s agency until she has enough alternative income sources. However, if she continues to do contract work for Mark’s agency, her personal integrity may interfere again because he apparently has no worries about what kind of clients he takes on. She should finish this job and continue to work with Mark, but more actively pursue other clients for her company.

Summary
Lisa, the sole proprietor of a fledgling Web site development company, works for a small advertising agency and frequently designs small to medium-sized Web sites. Mark, the agency principal, has recently begun asking her to develop larger Web sites, including one for a new lending-company client just starting his business.

Lisa began by using the basic Web site content and graphical representation ideas to create a logo and design for the Web site. After receiving the site content, however, she noted that the company did not appear to be a conventional lending institution. Instead, it was a new business start-up, a one-person operation designed to provide home mortgage loans to high-risk/bad-credit clients who had few other prospects for getting a mortgage. Knowing that many lending companies that focused on high-risk borrowers often charged much higher interest rates than traditional lending institutions and made deals with new home buyers for mortgages far beyond their financial means, Lisa began to worry that this start-up was such a lender. She felt hesitant, confused, and angry with Mark for putting her in this position.

Though she knew it was important both to the growth of her company and the welfare of her family (she was a single parent with two children), she spoke to Mark about her uncertainty regarding completing the project. Mark unapologetically explained that she needed to concentrate on serving the client while allowing the client’s potential customers to decide whether to use the company’s services. He also told Lisa that if she stopped work on the project, she would not be paid for what she had completed and that he would no longer plan to send work her way.

Questions
What should Lisa do: complete the site as contracted, or refuse to finish it?
What is the responsibility of a contract employee to the ultimate—even if quite remote—user of her services?
Do Mark’s attitude and explanations provide reassurance or even greater cause for concern?
Do Lisa’s own vulnerable financial circumstances and her responsibility for her children affect her ethical responsibility in this situation?
Until she is completely established as her own boss and able to make all the decisions, she cannot afford to be choosy.

Dina Hershberger
Senior Member

Dear Editor,
Lisa has a much bigger problem than developing a Web site for a possibly unscrupulous lender. She has a serious Rescue Compulsion to deal with. Lisa is assuming that this lending company would operate unethically and take advantage of "troubled" families. She views potential customers of this lender as unwilling victims who have no choice but to be swindled. However, unless the client's Web content says "We aim to cheat hardworking families," Lisa has no way of seeing the future or knowing how the owner will work with clients.

The only thing Lisa can be sure of is that she will lose all future income from Mark’s agency if she does not complete the job. Is she willing to risk her family’s welfare because of an assumption about a client she has not even met? Or can she accept that other people are responsible for their decisions, not she? Lisa’s only responsibility is to her family and then to her immediate employer (Mark’s agency).

Lisa should complete the job, take the money, and schedule an appointment with a therapist to work on her codependence issues!

Anne Marie Huggins
Member

Dear Editor,
As Lisa is contracted to do the work, she should finish it. The issue, to me, is that she should have had sufficient understanding of the company before she started designing logos, etc. That was the time to say no.

I think the ultimate responsibility is to the person who is paying you to do the work. You owe the end user a good experience, but the content comes from the person who has paid you to do a job.

I would be looking for another source of work. Mark is using Lisa’s vulnerability to bludgeon her into doing something she is not comfortable with. I’d suspect now that she’s raised her concerns, he’d be looking for someone else anyway.

Lisa’s financial circumstances and her responsibility for her children don’t affect her ethical responsibility. Bottom line: once you’ve committed to do a job, you should finish it.

Steve Salter
Member

Dear Editor,
I believe Lisa should set aside her concerns about the ethical values of the customer whose Web site she is developing. She should complete this site as contracted, then afterwards decide whether she wants to accept future assignments that raise ethical challenges.

Does a contract employee have a responsibility vis-à-vis the product being promoted, with regard to the ultimate user? That’s a matter of personal philosophical or moral choice, but in this case, it appears the client’s product is not deceiving anyone, so if Lisa is going to decide not to contribute her own work toward the client’s business success, then the proper time to implement that decision is after she has completed the contracted work in-progress, not in the midst of it. If a contractor wants to apply an ethical “filter” to the types of jobs she will accept, then apply that filter before starting the job.

Mark (to whom Lisa is subcontracting) has made a clear ethical choice about this issue (that is, “caveat emptor”), so the dilemma is Lisa’s alone. Mark’s threat to Lisa, should she quit the project in midstream, seems based on reasonable contractual expectations.

Lisa’s vulnerable financial circumstances (single parent with children to support) don’t matter in this case, which is about finishing her present work commitment, then perhaps declining future jobs that present ethical challenges.

Dennis Wilson
Senior Member
**February 14–18, 2008**
Boston, Massachusetts

The American Association for the Advancement of Science (AAAS) will hold its 2008 annual meeting at the Hynes Convention Center, the Sheraton Boston, the Boston Marriott Copley Place, and the Hilton Boston Back Bay. The meeting theme is “Science and Technology from a Global Perspective.” For more information or to register, please visit: [www.aaas.org/meetings/Annual_Meeting](http://www.aaas.org/meetings/Annual_Meeting)

**February 26–28, 2008**
San Antonio, Texas

The American Society for Training and Development (ASTD) will hold the ASTD TechKnowledge 2008 Conference and Exposition at the Grand Hyatt San Antonio in San Antonio, Texas. For more information, please contact:

ASTD
+1 (703) 683-8100
+1 (703) 683-8103 (fax)
[www.tk08.astd.org](http://www.tk08.astd.org)

**March 14, 2008**
Paris, France

The France Chapter STC will host its annual conference at Maison Internationale de Cité Universitaire de Paris in Paris, France. This year’s theme is “Communicating Europe.” The conference will celebrate the diversity of technical communication in Europe. For more information, please contact:

France Chapter STC
conference@stfcfrance.org
[www.stfcfrance.org](http://www.stfcfrance.org)

**March 14–15, 2008**
Atlanta, Georgia

The Atlanta Chapter STC will host its annual conference, “Currents 2008,” at the Southern Polytechnic State University campus in Marietta, Georgia. Jean-luc Doumont is scheduled to be one of the conference’s speakers, and Mark Clifford, STC First Vice President, will deliver the keynote address. For more information, please contact:
Dirk Bender
dirkbender@gmail.com
[www.stcatlanta.org/currents.htm](http://www.stcatlanta.org/currents.htm)

**March 28, 2008**
Rochester, New York

The Rochester Chapter STC will hold “Spectrum 2008” at the R.I.T. Inn and Conference Center in Rochester, New York. STC Fellow Ginny Redish will serve as keynote speaker. Redish founded the Document Design Center for the American Institutes for Research in 1979 and is now a usability consultant for Redish & Associates, Inc. For updates, please watch: [www.stcrochester.org](http://www.stcrochester.org)

**April 2, 2008**
New Orleans, Louisiana

The Association of Teachers of Technical Writing (ATTW) will hold its eleventh annual conference in New Orleans, Louisiana. This year’s theme is “Connecting Communities.” For more information, please contact:
ATTW
[cms.english.ttu.edu/attw/conference/conference](http://cms.english.ttu.edu/attw/conference/conference)

**April 2–5, 2008**
New Orleans, Louisiana

The National Council of Teachers of English (NCTE) will hold the 2008 Conference on College Composition and Communication (CCCC), “Writing Realities, Changing Realities,” in New Orleans, Louisiana. For more information, please contact:
NCTE
+1 (877) 369-6283
[www.ncte.org/cccc/conv](http://www.ncte.org/cccc/conv)

**April 3–8, 2008**
New York City, New York

The International Society for Performance Improvement (ISPI) will hold its forty-sixth annual conference at the New York Marriott Marquis Hotel in New York City. This year’s theme is “Enhancing Knowledge, Know-How, and Results.” For more information, please contact:
ISPI
+1 (301) 587-8570

**April 6–10, 2008**
New Orleans, Louisiana

The American Chemical Society (ACS) will hold its spring 2008 national meeting and exposition in New Orleans, Louisiana. The conference will feature cosponsored symposia with the American Institute of Chemical Engineers (AIChE). For more information, please contact:
ACS
+1 (202) 872-4600
[www.acs.org](http://www.acs.org)

**April 10–14, 2008**
Miami, Florida

The American Society for Information Science and Technology (ASIS&T) will hold the Information Architecture Summit 2008 at the Hyatt Regency Miami in Miami, Florida. For more information, please contact:
ASIS&T
+1 (301) 495-0900
meetings@asis.org

**April 14–15, 2008**
Winnipeg, Manitoba, Canada

The Manitoba Chapter STC and Red River College will hold their fifth annual technical communication conference at the Red River College Princess Street campus. STC Past President and Manager of Conferences Saul Carliner will serve as keynote speaker. For more information, please contact:
Brad Friesen
Brad.L.Friesen@gmail.com
[www.stcmanitoba.org](http://www.stcmanitoba.org)

**April 16–18, 2008**
Ljubljana, Slovenia

The TransAlpine Chapter STC—representing Austria, Germany, Italy, Slovenia, and Switzerland—will hold its 2008 conference at Hermes Softlab in Ljubljana, Slovenia. The event kicks off with a one-day workshop on Wednesday, April 16, followed by the two-day conference
on Thursday and Friday, April 17–18. For more information, please contact:
Dan Jones  
+41 44-625-32-10  
daniel.jones@zurich.com

April 28–May 1, 2008  
Albuquerque, New Mexico

The National Association of Government Communicators (NAGC) will hold its Communications School, “Mesas, Messaging, and Mentoring,” at the Marriott Hotel in Albuquerque, New Mexico. The event is designed to provide networking opportunities and practical educational sessions to help government communicators increase their skills. For more information, please contact:
NAGC  
+1 (703) 538-1787  
www.nagc.com

May 1–3, 2008  
Denver, Colorado

The American Society of Indexers (ASI) will hold its fortieth annual conference at the Warwick Hotel in Denver, Colorado. For more information, please contact:
ASI  
+1 (303) 463-2887  
conference@asindexing.org  
www.asindexing.org

May 16–20, 2008  
Vancouver, British Columbia, Canada

The Council of Science Editors (CSE) will hold its 2008 annual meeting at the Hyatt Hotel in Vancouver, British Columbia, Canada. For more information, please contact:
CSE  
+1 (703) 437-4377  
CSE@councilscienceeditors.org  
www.councilscienceeditors.org

May 22–26, 2008  
Montréal, Canada

The International Communication Association (ICA) will hold its annual conference in Montréal, Canada. For more information, please contact:
ICA  
+1 (202) 955-1444  
www.icahdq.org

May 28–30, 2008  
Boston, Massachusetts

The Society for Scholarly Publishing (SSP) will hold its thirtieth annual meeting at the Westin Copley Place Hotel in Boston, Massachusetts. For more information, please contact:
SSP  
+1 (617) 262-9600  
www.ssnet.org

June 1–4, 2008  
Philadelphia, Pennsylvania

The 2008 Technical Communication Summit will be held at the Pennsylvania Convention Center in Philadelphia, Pennsylvania. The conference will feature evaluation workshops and technical sessions in the following areas: designing and assessing user experiences; developing and delivering content; producing and publishing information; managing people, projects, and business; developing your skills and promoting your profession; and applying research and theory to practice. In addition, preconference certificate programs—Management, Master Writers, Technical Communication 101, Usability and Accessibility, and Design and Development—will be offered, and “Institutes,” conferences-within-the-conference, will explore the areas of instructional design, business development, globalization and localization, and content management in depth.

Howard Rheingold, founding executive editor of Hot Wired and author of Smart Mobs, The Virtual Community, and Tools for Thought, will be the event’s keynote speaker. For more information or to register, please visit www.stc.org/55thConfIndex.asp.

June 16–20, 2008  
Baltimore, Maryland

The Usability Professionals’ Association (UPA) will hold its annual conference, “The Many Faces of User Experience: Usability through Holistic Practice,” at the Baltimore Marriot Waterfront in Baltimore, Maryland. For more information, please contact:
UPA  
office@usabilityprofessionals.org  
www.usabilityprofessionals.org

July 13–16, 2008  
Montréal, Canada

The Professional Communication Society (PCS) of the Institute of Electrical and Electronics Engineers (IEEE) will hold its annual International Symposium on Technology and Society (ISTAS) at the University of New Brunswick in Fredericton, New Brunswick, Canada. The symposium is a multidisciplinary event for researchers in engineering, computer science, social sciences, arts, and humanities; community-based researchers; policymakers; and technology-using communities. For more information, please contact:
IEEE PCS  
Bill.McIver@nrc.ca  
www.istas08.ca

F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org. For STC’s complete calendar of events, visit www.stc.org/edu/relatedEvents01.asp.
Before I joined the Toronto Transit Commission (TTC), my work was like that of most technical writers: I wrote documents and training materials for people using computers. It dawned on me that my job at the TTC was going to be different when my new supervisor called a few days before I began work. “Be sure to bring steel-toed safety boots,” he said. Several days later I found myself in the subway tunnels of Toronto learning how to avoid trains and stepping on the 600-volt power rail.

A network of bus, subway, and streetcar routes, the TTC serves more than 440 million customers annually. I’m a curriculum development specialist in the training department. I design and develop training for a wide variety of TTC employees, including bus, streetcar, and subway drivers; track maintainers; structure repair persons; mechanics; electricians; and supervisory staff. Most of them do not use computers on the job; training is largely skills-based and hands-on.

In the training department, we have over 100 instructors and offer over 160 courses every year. My responsibilities include a full range of technical writing and instructional design activities, including needs analysis, design, development, and evaluation. Most of my time is devoted to writing manuals, job aids, lesson plans, and other instructional materials. I create these materials working with instructors who are assigned to course development projects as subject matter experts.

While some training is conducted in classrooms, much of it takes place in the field. An operator learns to drive a bus not by sitting in a classroom but through guided practice driving on the street. A track maintainer learns to use power tools safely through hands-on demonstration. A route supervisor learns to reroute buses and manage the runs by getting out on the route.

**Behind the Wheel**

Developing this kind of training is always interesting. While I’m most often typing away in my office, I have frequent adventures. In addition to walking in subway tunnels, I have visited carhouses where subway cars and streetcars are repaired and rebuilt, large bus garages serving our fleet of over 1,800 conventional and paratransit buses, and numerous construction sites and other work locations. One memorable day, I learned the ins and outs of driving a streetcar. I also enjoyed consulting with a community advisory group to improve our training on customer service for people with disabilities.

**Best Practices and New Technology**

Since our training is largely of the traditional, instructor-led type, we may be a bit behind the times in our use of instructional technology. While we have begun to explore computer-based training for some limited applications, our training products are largely print-based. But this limitation has also been an advantage, since we have been able to focus on improving the quality of our content. Over the last few years, we have made our manuals and workbooks easier to use and read by following best practices in structured writing, clear language, and document and graphic design.

This is not to say that we aren’t using new technology in our training. Recently, we purchased a bus simulator, and one of my current assignments is to integrate simulated driving scenarios into our bus driver training. We are also looking forward to using subway and streetcar simulators as well as adding multimedia technology to our classrooms.

Looking back on my career as a technical writer, I can only say you never know where your career will take you. While working at the TTC, I have discovered a fascinating behind-the-scenes world of mass transit and a training world that I barely knew existed.

George Free, Ph.D., is an educator and curriculum developer with over fifteen years’ experience in the academic and corporate worlds. He can be reached at george.free@ttc.ca.