June 2004

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SOCIETY FOR TECHNICAL COMMUNICATION

The San Diego Signature

Award of Excellence 2003 Newsletter Competition

E-mail: stcsignature@yahoo.com

Newsletter Staff

Newsletter Information

Advertising Information

2003-2004 Chapter Council

STC Mission Statement

San Diego Members: To receive chapter e-mail, contact Patricia Ray at Pat@TheWriteAttitude.com.

Visit the San Diego Chapter Web site at www.stc-sd.org

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Feature Article

Clash of the Titans

By Deobrah Gill-Hesselgrave

Time and cost clearly affect the bottom line of every project. Therefore, these factors tend to be the ones management measures. Quality, on the other hand, is a less obvious contributor to cost. As a result, it is the rare occasion when quality is identified as the key contributor to a project's failing to miss either its time or cost goals.

2004 Region 8 Conference

Ambitious Region 8 Conference set for July

Advice

By Gail Van Landingham

Be an employee, think like a contractor

A conversation with Deborah Gill-Hesselgrave

Accepting contributions for our quarterly *Member Scoop* column

Please send scoop contributions to Kitt at: kitt.medrano@wote.com.

We'll try to keep you in the loop with our *Member Scoop*.

Dear Tek Wright

The "Dear Abby" of the technical communication world

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Humor

By Karen Field Carroll

Most Likely to Write a Humor Column

Book Review

By Richard Garner

Meeting the Challenge of the Rhetorical Situation

A Review of Charles Kostlenick's and David D. Roberts' *Designing Visual Language: Strategies for Professional Communicators*

LavaCon 2004

Call for speakers

Chapter Meetings

- June Meeting

- May Meeting

New Members
By Sue Heim
What's new in Membership?

Editor's Desk
By Catherine Robinson, Outgoing Managing Editor
Thanks to Contributors and Welcome to Incoming Managing Editor

By Carole Johnson, Incoming Managing Editor
Calling All Contributors!

President's Podium
By Walter Hanig
So long!

Sponsorship Opportunities
By Michael Cárdenas

Designing the future of technical communication

Newsletter Staff

Return Home

More about the
San Diego Signature

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Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Newsletter Information

Return Home

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About the San Diego *Signature*

Signature is the newsletter of the San Diego Chapter of the Society for Technical Communication, a nonprofit professional organization dedicated to educating and advancing the careers of technical communicators. Newsletters are published monthly during the chapter year (September through June).

STC has more than 25,000 members and 150 chapters nationwide. For more information about the San Diego Chapter, visit our Web site at www.stc-sd.org or call our hotline at (619) 525-7716. Write to us at:

STC San Diego
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Article Submission

This newsletter invites writers to submit articles to be considered for publication. Send your query and request for writer's guidelines to stcsignature@yahoo.com. Submission deadlines are the first of the month before the publication month. Publication is dependent on space availability.

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In your cover letter, please let the editor know if this article has run elsewhere and if it has been submitted to other publications for their consideration.

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Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Advertising Information

Return Home

Signature Advertising Information

Got questions? Comments? Want to place an ad? Contact the editor at stcsignature@yahoo.com

Publication Overview

Signature is a Web newsletter published by the San Diego Chapter, Society for Technical Communication (STC). It is issued 10 times a year to more than 300 local technical communication professionals, managers, and educators. Other STC chapters, special interest groups, and related organizations also receive e-mail notification when each issue is posted. Because *Signature* is on the World Wide Web, readership is potentially unlimited.

Signature contains information produced by technical communicators for technical communicators. Advertising in *Signature* is the most direct way to reach the growing technical communications market in San Diego and the surrounding area.

Publication Schedule

Signature is published every month except July and August. Each issue is posted on the Web within the first three days of the issue month. Closing date for advertising is the 10th of the prior month.

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- Prepayment for five issues: 10 percent discount
- Prepayment for 10 issues: 20 percent discount

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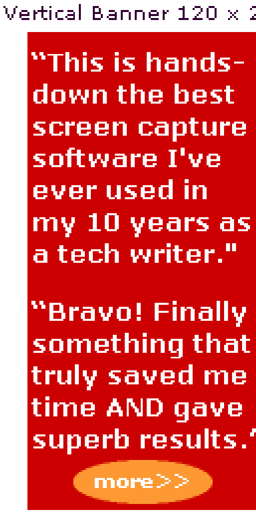

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Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

[Return Home](#)

2003-2004 Chapter Council

Chapter President Walter Hanig
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Walter is responsible for a project converting a large suite of internal and end-user documentation to structured FrameMaker 7 at NCR.

He has served the chapter as Finance vice president and administrative council jester for four years before last year's adventure as chapter president.

VP-Professional Develoment Michelle Petersen
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Michelle is a senior technical writer at Alaris Medical Systems in Sorrento Mesa.

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Beth has a varied background in finance, accounting, and technical communications. She is a senior technical writer at Intuit.

Treasurer and Hotel Liaison Lance-Robert
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Lance is the senior technical information engineer at Tarari in Rancho Bernardo. This is his second term as chapter treasurer and first term as chapter hotel liaison.

VP-Membership Sue Heim
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Sue is a technical writing consultant in San Diego. She previously served in the San Diego Chapter as vice president-Professional Development and as JobMail coordinator.

VP-Programs Michael Cárdenas
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Michael is president of Multilingual Translations, Inc., a localization company headquartered in San Diego since 1985.

Newsletter Managing Editor Catherine Robinson
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Catherine is a technical writer at Websense. She has enjoyed contributing her time and efforts to STC in the capacity of judge of the technical writers' competition and proofreader of the monthly newsletter.

Newsletter Assistant Editor Jennifer Mallory
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After Jennifer graduated with a degree in literature, she waited for the job offers to flood in. When the surprise and rejection wore off, she began a lengthy career in marketing and editing. Currently, Jennifer works as a health information specialist II with the county of San Diego.

Chapter Web Site Manager Kelley Wilson Mesterharm
kelleyw@cox.net
Kelley has an instructional and curriculum design background with experience in Web accessibility and usability.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

STC Mission Statement

Return Home

STC Mission Statement

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Our mission statement is: **Designing the future of technical communication**

The Society for Technical Communication (STC) is an individual membership organization dedicated to advancing the arts and sciences of technical communication. STC is the largest organization of its type in the world. Its 25,000 members include technical writers, editors, graphic designers, videographers, multimedia artists, Web and Intranet page information designers, translators, and others whose work involves making technical information available to those who need it.

Society membership provides opportunities for ongoing learning and professional networking. Through the efforts of a small, full-time staff and a large network of volunteers, STC promotes the public welfare by educating its members and industry about issues concerning technical communication.

- **Member:** $125 per year (plus a one-time $15 enrollment fee)
- **Student Member:** $50 per year (enrollment fee not required)

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

LavaCon 2004

Return Home

LavaCon: Calling for speakers

LavaCon, the International Conference on Technical Project Management, is now accepting proposals for speakers. LavaCon 2004 will be held in New Orleans from September 25 through 30.

Sessions should address how to manage technical communication projects, technical communication teams, and your technical communication company/career. Non-technical-communication-specific sessions are also needed.

The complete call for speakers is available at www.lavacon.org.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Return Home

Click here for June 9 meeting details.

If you make a reservation but find you cannot attend, please cancel your reservation by sending an e-mail to Lance-Robert at treasurer@stc-sd.org. The chapter has to pay the hotel for all no-shows, which takes money away from various programs that could otherwise benefit the chapter members.

There is no financial penalty for cancelling your reservation. If you used PayPal to pay for your reservation in advance and need to cancel, the full amount will be refunded to your account within three working days.

May meeting attendance numbers:

38 attendees
3 cancellations
3 no-shows
9 used PayPal

Chapter Meetings

June Chapter Meeting Preview: STC conference to be summarized and volunteers to be recognized

By Michael Cárdenas, VP Programs

The June meeting will focus on two special topics: the STC annual conference and volunteer recognition.

STC annual conference

Join us at the June STC meeting, and find out what was hot at the annual conference from some of our members who attended. They will talk about new tools, new technology, and new trends.

Sure, they paid more than you did for such juicy info, but so what. Call me a bargain hunter, but I enjoy a good deal when I can get one.

Volunteer recognition

Contrary to what some members may believe, the STC board is a volunteer organization, no high salaries or big compensation programs, just the love of what we do. Sorry, I lied—we do get a free dinner during the June meeting.

Please join us in thanking last year's volunteers and welcoming next year's excellent board member and volunteer lineup. Watch out, you might also be persuaded to become a volunteer!

May Chapter Meeting Highlights

By Kitt Medrano

President Walter Hanig was attending the 51st Annual STC Conference in Baltimore, so Lance-Robert (our incoming president) opened the meeting in his absence by inviting those looking for work to describe their skills and desired positions. He then asked members with job announcements to describe the positions and desired skills. Lance also welcomed first-time attendees and asked them for their reasons for coming and what they hoped to get from the meeting.

Announcements


Walter Hanig, President & Sue Heim, VP Membership


Michael Cárdenas, VP Programs

Election results are in.

- President: Lance-Robert
- Vice President of Programs: Michael Cardenas (no change)
- Vice President of Membership: Sue Heim (no change)

Thanks to the following members for stepping up to these new assignments:

- Webmaster: Eric Hurd
- *Signature* Managing Editor: Carole Johnson

Welcome, everyone, and best of luck in your new positions!

Featured Topic: "Indexing - The Good, the Bad, and the Ugly" by Sue Heim

The following are highlights from Sue Heim's presentation. For additional resources, you can email Sue at sue_heim@msn.com, and she will send you a PDF of her PowerPoint presentation.

- Two types of indices are the *standalone index* (used in printed material) and the *embedded index* (used in online material).
- Indices can
  - be a main point of entry for user assistance
  - provide a detailed analysis of topics included in the document
  - help familiarize users with terms and concepts used
- An index is not a table of contents or a concordance.
- Good indices should be
  - complete

  - easy to use
  - accurate

  It is better to have no index at all than to have a bad index.

- Indices should be task oriented.
- Users should be able to find answers quickly, or you will risk customer dissatisfaction.
- Learn about your users; conduct usability tests.
- Learn about your competitors; review their indices and compare terms. Index their terms using "See" references if appropriate.
- Find out about common support calls. Answer those questions in your document, and then index them so customers can find the answers quickly.
- Size matters! A general rule of thumb is 5 to 10 percent of the size of the book or help system. You should have 5 or 10 index entries for every 100 words. But don't overindex. Too many index entries can make it difficult to find information easily.
- Avoid endless scrolling lists of secondary entries by breaking them down into topics. Try to keep the number of secondary entries to no more than 15.
- Use nouns and noun phrases for primary entries, and use verbs or modifiers for secondary entries.
- Invert entries, e.g., "Keyboard shortcuts"; "Shortcuts, keyboard."
- Avoid using abbreviations. For abbreviated product names, use a "See" reference.
- Arrange entries for emphasis by placing the most important word first.
- Be consistent with punctuation, tense, and verb/noun

relation. These can result in multiple and erroneous entries.

- *Edit, edit, and edit again!* Always be sure to edit your index. Several editing passes should include
    - creating or deleting entries
    - combining or splitting entries
    - regrouping or rewording entries
    - verifying the accuracy and ensuring consistency of the entries
- Always test your index before releasing the document.
    - Spot check a few entries to make sure they are accurate.
    - Test for style and usage consistency.
- If multiple indexers are working on a project, be sure to talk to each other.
- Use a style guide. Start with an established one and then embellish or customize.
- Indexing as you go can cut the amount of time you spend at the end by half.

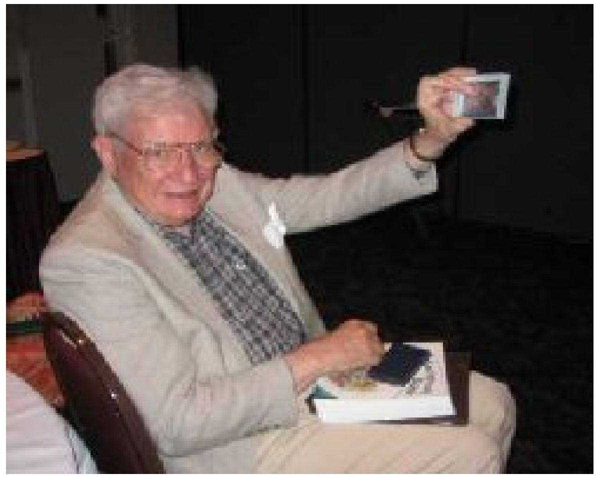
May Meeting Wrap-up

This month's raffle winners:

- **Marilyn Allison** won a Wally buck.
- **Kitt Medrano** won an STC business card holder.
- **Susan Gardo** won an office supply magic cube.
- **Don Bush** won an STC business card holder.
- **Kathleen Derzipilski** won an office supply magic cube.

- **Jennifer Hinton** won an STC duffle bag.

The June meeting will be an STC conference summary and volunteer recognition. Thanks for coming. See you in June!



Don Bush

Jennifer Hinton

Kitt Medrano

Sue Heim and Marilyn Allison

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

Return Home

Feature| Editor's Desk| President's Podium
Technical Issues| Chapter Meetings
Humor| Advice| Employment Desired
Mission| Author Bios| Newsletter Staff| San Diego Chapter Council Members

June 2004

Return Home

Author Bio

Contact Deborah

Feature Article

Clash of the Titans

By Deborah Gill-Hesselgrave

I've just completed a major six-month project. It began life in a healthy fashion. The scope was known, the deliverables were well defined, and the timeline was both rational and agreed upon by all parties.

By the time we shipped the final deliverables, the scope had nearly tripled, the deliverables were a lot like Forrest Gump's box of chocolates, and the timeline had mutated from precise to amorphous. And, as for the cost, let's just say that this was a perfect case study in support of fixed-price projects as a boon for customers and a bust for providers.

I attribute many of the problems we faced during the second half of this project to our not investing time to develop a known, measurable, and enforceable project plan. We also lacked a shared understanding of the client's requirements regarding quality and time.

In this article I'm going to share my thoughts about the titans that drive every project: quality, cost, and time.

Quality, Cost, and Time

As technical communicators, we constantly drive ourselves to deliver products that are precise, accurate, and clear. We and our managers demand that we meet our deadlines. And through achieving those two goals—quality and on-time delivery—we succeed in our jobs.

To be successful, we plan, we research, we outline. We draft, we proof, and we proffer review copies to editors and SMEs. We manage and implement change requests, we proof (again), and we package and publish our final deliverables. And at the end of each project we collapse in exhausted but proud and satisfied heaps knowing that we did all we could to satisfy the sometime warring requirements of quality, cost, and time.

When we skip a step or shortcut a process, we know that we will certainly compromise at least one leg of this three-legged stool. On those rare occasions when one of our projects fail, it is usually not the level of quality that causes us to reluctantly take that walk of shame into our manager's office. No. We are usually invited in for "the talk" either because the project missed the delivery date or it ran over budget.

I think that the reason for this is twofold: 1) time and cost are quantifiable metrics; 2) quality is, well, qualitative.

Without an observable, measurable metric, quality is largely a perception. So, unless your project is using an agreed upon set of standards that provides criteria for assessing its quality, quality is pretty much whatever you or your manager say it is.

Two True Statements

Let's assume that the following two statements are true.

- Quality takes time.

- Time is money.

Time and cost clearly affect the bottom line of every project. Therefore, these factors tend to be the ones management measures. Quality, on the other hand, is a less obvious contributor to cost. As a result, it is the rare occasion when quality is identified as the key contributor to a project's failing to miss either its time or cost goals.

Additionally, except for senior managers and independents, most folks on the business end of producing technical communication products have virtually no direct influence on what a project's costs need to be in order to make the project profitable, and rank-and-file staffers usually lack access to this information, anyway. Consequently, as practitioners we can only affect cost through our ability to meet the deadline.

Because time is a direct contributor to a project's cost and because time and cost are linked, let's proceed for now as though these two elements are one, and let's simply call this combined entity "time." This leaves us with two titans that we can attempt to tame: quality and time.

The Paradox

Going back to our two assumptions, quality takes time and time is money, we are ultimately faced with a paradox: on the one hand, we are expected to meet cost/deadline requirements in order to satisfy the company's bottom-line demands while at the same time we are tasked with achieving a quality level that is usually undefined and, as a result, is difficult to measure.

A prerequisite to working our way out of this paradox is to establish just what we mean by quality and time.

Quality

What is quality?

Quality tends to be amorphous, changing depending on who is describing it. Most operational definitions I've heard regarding quality include something like "lacks errors." As writers and editors, we can easily apply known rules of grammar, mechanics, presentation, etc. to our work and meet the requirements in those areas. But is that the quality standard our products must meet? Is it the only quality standard?

Gerald Weinberg, a software quality expert, defines quality as something that provides "value to some person." But this definition remains too loosey goosey to be of much use. Because value to any one (or more) person can vary over time (because what I need to know today I may not need to know tomorrow), quality can be better defined as "value to one or more persons over some period of time." For example, in the project I recently completed, quality was defined as that information in the final report that will allow the client's senior executives to achieve their fiscal strategic plan over each of the next three years. And, because we appended an additional year to our analysis and recommendations, we increased the value and relevance—the quality—of the finished product by 33 percent.

To begin applying this definition to your own work, identify who the person or people are who need to derive value from your product. Then determine what the period of time is during which they must be able to derive that value.

For example, the developers' guides I am writing need to support the immediate learning needs and the ongoing reference needs of future developers on the project for the period of time during which they will be updating or revising the current code base. Quality for the developers includes accurate, well-presented information that allows them to learn what they need in order to perform specific tasks over a period of time that probably won't exceed a year.

The guides are also targeting another audience, potential investors. For this class of users, quality means providing them with value for the small window of time that is represented by the period between their reviewing the guides and their analyzing the return-on-investment potential if they choose to invest in the company. Quality for the investors includes the actual existence of such documents (for succession planning and disaster recovery), with no judgment about the accuracy of the contents, for a period of some weeks to as much as a couple of months.

Time

What is time?

So how do we determine whether our project is on time? At the risk of stating the obvious, time is relative.

Time is the period in which one has to hit a market window (e.g., during Q2) or meet a promised delivery date (e.g., May 15).

Market windows tend to narrow as they approach, and actual delivery dates become more fixed and immutable the closer they get. Targeting and hitting a market window early means the company can exploit first-to-market opportunities to establish itself and its products with the early adopters and to begin penetrating the class of customers who follow the early adopters. But, as time progresses, market windows that began as fully open tend to narrow and then close.

Similarly, promised delivery dates become fixed and immutable as time counts down to the date. It is easier to renegotiate a delivery date with a client early in a project than it is when the deadline is only a few weeks or days away. The closer the date, the less the likelihood of extending it without costing the company money—whether in real and immediate revenues or in goodwill or potential future business.

As a result of these truths about market opportunities and customer promises, on-time delivery becomes a discussion in relativity.

With market-driven deadlines, deciding whether it is acceptable to miss the date requires factoring in the risks and benefits of both hitting and missing the market window. With promise-driven dates, renegotiating the deadline early presents far less risk to the customer's confidence in your company and its products than does changing the deadline later in the project—especially if you have to reset the anticipated delivery date more than once.

So, time is relative. Early in a project, time is more flexible and open to change and presents less risk. Later in the project, time is far more fixed, and changes to the target date can both threaten the company/client relationship and significantly reduce the perceived satisfaction the customer will have regarding both the company and the delivered product.

Taming the Titans

Clearly, our goal should be to support our company's efforts to ship quality products on time and at a cost that generates a profit. And, just as clearly, consistently reaching this goal is easier said than done. So how do we increase our likelihood of taming these titans?

Faced with the sometimes conflicting demands of quality and those of the Siamese twins cost and time, we must find ways to calm the clash and force these elements to work for us.

First, we have to avoid choosing between one or the other. Then we need to eliminate the constraints that prevent us from satisfying them all equally well. So we have to do the following.

Get the right information.

Every product has specifications that define its quality and cost. Every project has a plan that defines the deliverables and the targeted dates. Make sure you have access to information that allows you to constantly and consistently measure and track the relevant elements of the specifications and the plan. To ignore or to fall out of touch with any of the resources that specify a product's quality, time, or cost goals is to invite disaster. Do you know what the criteria are for quality? time? cost? Are these definitions collectively known and agreed upon throughout your project's team?

Use the best information.

Don't be passive about the quality of the information you're being provided. You cannot make silk out of a sow's ear; if you don't have the right information, the most current information, or complete information, you need to change that situation. This does not mean passively noting it in the "Obstacles/Issues/Concerns" section of your weekly or monthly report. It means trotting yourself to the person who holds the key to whatever information you need and actively ensure that you get what you need in order to deliver a quality product on time (and, thereby, within budget).

Choose the right processes.

Most of us employ the same or, at least, similar processes to produce our products regardless of whether we are developing user guides, Web sites, employee handbooks, proposals, or whatever. To make sure that your processes fulfill the needs of quality, cost, and time, you need to periodically review these practices and conduct project postmortems. Each postmortem should result in an articulation of how well each step of the process supported the project's quality, cost, and time requirements.

What steps had a direct influence on each of these elements? What happened if you skipped or modified a step? Did you have wiggle room to truncate a step to reduce a negative impact on time, for example, but still fulfill the quality requirement?

And, last but certainly not least, do it right the first time.

This should be a no-brainer, but do you and your department achieve it day in and day out? And do you achieve it for every step of your process, from planning to researching to outlining through publishing? Think about these questions: does your planning phase begin and end on time? Does it produce a plan that supports the project's requirements? Is your researching phase conducted per the schedule, and does it yield the depth and breadth of quality information you require to produce the necessary deliverables on time and at the expected level of quality? Do you know how quality is measured? Do your managers and other project stakeholders?

Many managers and practitioners argue that each phase of the writing process is intended to incrementally improve the quality of the product one phase at a time, that, if there is a slip in one phase, it can be made up in the next phase. Although I don't disagree with this, this contention hints at an attitude that compliance with the quality/cost/time mandate is optional during some phases (like drafting) but not during others (like publishing). With that perspective it's easy for us to develop hard-to-shake patterns of behavior that end up working against the underlying benefits of doing it right the first time, every time.

Peace

For peace to reign among these titans, you must first eliminate the ambiguity of what quality means to you and to all of your project's stakeholders. To do this, you must have a set of specific, observable, measurable criteria that define the characteristics of quality. Then you must continuously assess your work against the project's quality definition throughout the project's lifecycle. If you do all of this, you will have quieted one of the beasts.

Next, take time at the beginning of each project to develop and communicate a defendable and actionable plan, one that supports the quality, time, and cost goals of the product as a whole. And, as with quality, revisit your plans at milestone stages throughout the project to ensure that all is as it should be. Through this iterative process, you will cause the ever-competing factors of time and cost to work with you.

Finally, I encourage you to be that voice in the wilderness that sounds the alert when the first hint of trouble threatens your project's established standards for quality, cost, or time. By being the project's defender against encroachments to its quality, cost, or time requirements, you can more effectively steer your projects away from failure (large or small) and to success.

Here's to making peace with the titans!

Acknowledgements

Thanks to:

- *Lee Thomas of IBM Rational for his thoughts on the paradox of quality and time*
- *Tom Dossenbach, managing director of Atkin-Dossenbach Associates, LLC, for his ruminations on how the goals of quality, time, and cost affect manufacturing*
- *Peter Sifferlen for sparking the conversation that resulted in this article*

June 2004

2004 Region 8 Conference

Ambitious Region 8 Conference set for July

By Patrick Lufkin

Return Home

STC Region 8 Conference information

Contact Patrick Lufkin, Region 8 Conference Publicity Manager, with any questions at lufkin@ix.netcom.com.

May 15 is the last day to qualify for your early registration discount to the conference. Don't delay!

Planning is currently underway for the 2004 Region 8 Conference, which will take place near Sacramento in July.

"Charting a Bold Course" is the theme of the conference.

In light of *post-dot-bomb* realities, conference director Eric Butow says, "Difficult times demand bold action and the ability to reinvent ourselves and our profession. We have chosen the conference theme in hopes of giving attendees the information and the tools they will need."

Ambitious Offerings

Conference planners say this will be one of the most ambitious conferences to date. In addition to several dozen presentations and seminars, the three-day conference will include a leadership retreat, a pavilion trade show, a job fair, a bookstore, computer terminals where attendees can check their e-mail and surf the Web, hands-on computer tutorials, and a keynote speaker for each day.

Incoming STC President Andrea Ames will be one of the keynote speakers. A full list of keynote speakers will be posted on the conference Web site as soon as it becomes available.

Approximately 300 attendees from Region 8 and adjoining regions are expected to attend the conference. Region 8 includes California, Nevada, Hawaii, Australia, and New Zealand.

Location and Price

The conference will take place July 25 through 27 (Sunday through Tuesday) on the campus of the University of California, Davis, which is located about 10 miles southwest of Sacramento. Housing will be available on campus and at nearby hotels.

Conference attendees are being offered several price packages, depending on how they wish to participate. Early registration discounts are available to those who register before May 15.

Volunteers Needed

To make it all happen, additional volunteers are needed. "We have a great team in place, made up of STC leaders from throughout the region," Eric says, "but they will need help to make this the best conference it can possibly be."

To encourage volunteers and lower financial barriers to attending, the conference is offering deep discounts to volunteers. Those interested should contact Anne Mehaffey at mehaf2@comcast.net.

Eric notes that, while discounts are important, the biggest benefits of volunteering are in the opportunities to make new friends and work behind the scenes with some of the best people in the field.

More Information

For more information and for updates as they occur, visit the conference Web site: http://www.stcregion8conference.org.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Advice Column

Return Home

Contact Gail

Be an employee, think like a contractor

A conversation with Deborah Gill-Hesselgrave

by Gail Van Landingham

When Deborah Gill-Hesselgrave (*dgh*) spoke to our local STC chapter about contracting in April, I saw a lot of relevance for my own work as an employee. I wanted to ask her a few questions about how to bring the perspective of a contractor to that of a full-time employee.

Question: How do you avoid becoming complacent?

You said that you became complacent after six months of contracting when the company treated you as an employee. What advice would you give to an employee about how to avoid becoming complacent?

dgh. Actually, the benchmark for me is about 18 months. For many years now, when a company wants me to become an employee, it is usually to fix some huge problem. I typically achieve the initial tactical goal within the first six months and then spend the next six months optimizing the various infrastructure issues I control.

Sitting back + cruising = complacency

By the 18-month mark, things are chugging along pretty well, and I find that I can tend to sit back and cruise. This is not a good use of me or the dollars being spent for me.

So, how do you avoid becoming complacent? I think the simple answer (the one that is actually hardest to act on) is to continuously see yourself and conduct yourself as a consultant. The minute you stop doing this, you begin down the path to complacency (the old "that's-not-my-job" view of the world).

Avoiding complacency

Avoiding complacency means:

- not being afraid to say no
- not being hesitant to push back on bad or less-than-optimal ideas
- continuously scanning the horizon for opportunities to do good, even if it means doing a little side gig for someone in another department on a skunk-works level (nonsanctioned, under the radar, and possibly on your own time).
- volunteering, coaching, and advocating, for example, volunteering for new assignments that may not specifically be in your job description or assigned area of responsibility; helping folks within and outside your group to succeed; coaching people senior to you; or championing better processes, better products, and expanded viewpoints

Bottom line: the antidote to complacency is activism. Be an internal activist, and you will not and cannot become complacent.

Question: How do you balance multiple projects for one company?

I have five projects, emails, multiple interruptions, and requests for information. And my boss has one project that she wants in an hour. Any suggestions on how to prioritize all this?

dgh. The power of "no." If you aren't willing to exercise the power of no, plan on eventually becoming complacent and even sooner becoming burned out and dispirited.

Planning for 80-percent on-target production

Tip #1: The Project Management Institute did some studies a few years back, and they found that the actual amount of time available for a person to produce is about 75 percent of their standard work day. (These were folks in fields such as programming, contracts administration, and product development and others that have direct corollaries to what folks in technical communication fields do.) I never have worked for an organization that willingly accepted the 75-percent finding, but I know of quite a few that allow for 80 percent of on-target production when they develop schedules.

So, one of the first things you have to do is to allow for and accept tasking for only 80 percent of your day. This means that in an eight-hour day, you can really and truly be attentive to production tasks for six hours. The other two hours are for email, interruptions, non-project-specific phone calls, and the like. Additionally, in your planning you must factor in demands to attend meetings related to each project, production expectations of the folks downstream, and unexpected projects from your boss.

Negotiating on deadlines

This brings us back to those extra requests from the boss and others (especially if you are applying some of my tips on how to avoid complacency). When you review your project assignment and examine your master project list (you do have one, don't you?), you need to be able to tell your boss, "I'm not going to be able to do those 13 screen shots for your presentation next week unless I can slip the first draft date for the reference guide from this Thursday to this Friday afternoon. If that's okay with you, I'll send Sean in Marketing a note right now, and then I'll get busy on those screen shots for you. Do you want them as JPEGs or TIFs?"

Knowing your company's strategic plan

Now, as to prioritization, if you don't know or don't have access to your company's strategic plan for this fiscal year, you need to change that right now. Your priorities must be in direct alignment with what the company is trying to achieve. Are they intent on getting that old, archaic product retired? Then you probably need to be helping to get the new flagship product out the door. Is the company heading down the road to reduce help center calls by 25 percent? Then you'd better be not only minding the store in terms of writing exceptional user assistance, but you might want to check in with the sales and the training teams to see how else you can support them so they can better prepare the customers to be successful.

Alerting your boss to conflicts

Once you are smart and hip about your company's strategic priorities, you need to take your understanding of those priorities and your view of how you're going to be a part of achieving those priorities to your boss. You need to lay out your plan on how you're going to contribute to those priorities and elicit her feedback so that the two of you are on the same page. Then, the next time she has a just-in-time request, you two can look to see how her request directly supports the company's priorities; if it doesn't, your job is to gently ask, "I see this is important to you, Sharon, but I'm concerned that this might distract us from getting the beta product out on time. What do you think?"

Okay, you asked a really big question, and, as you can see, the answers to it can be complex. You need to know:

- how much real time you have available to be successful
- what your company's priorities are
- when to alert your boss to conflicts and tradeoffs
- how to keep communications open because priorities do change and often without your knowledge

Remember, you must be in charge of ensuring that you and your boss are always on the same page. You have one boss; she has more than one you.

Question: How do you keep the company's success as your number one focus?

Your goal is to make the company successful. How do you keep this as the main objective, especially when you're bogged down in the details?

dgh. If the details are not going to directly contribute to the big picture, they are the wrong details. Again, just as I noted above, you must know what the company's priorities are.

Knowing the company values

Additionally, you must know the company values.

Does it value time to market? If so, then elements of quality take a back seat. (I swear on everything right and holy in this world that this is a true statement as much as technical communication professionals hate to hear this!)

If customer satisfaction is truly a value that your company supports, then slipping a schedule in order to measurably improve a deliverable will be accommodated.

But no matter what the core value of the company (note that inherent in "core" is the notion of a singular value, not a laundry list of righteous wishings), your contributions must directly influence that core value.

At a nutrition company. My nutrition company client's core value was making a positive difference in the lives of customers who bought the product. Therefore, it was important to make sure that we had accurate information that was easy to access. But even more important was our being able to provide professional support by phone and email to help customers through the necessary lifestyle changes.

For the nutrition company, a fight occurred because the investors were negative when we told them we were going to staff a help center. (They wanted that stuff to go to an outsourced call center.) Once I explained that what differentiated us from the competition was our commitment to partner with and coach our customers, they backed off and gave us the support we needed.

At a medical device company. My medical device client's core value was accuracy. We held up a release because we got some weird results on a final validation run through QA. This impacted my part of the project and, knowing that lives could be affected, it was a given to hold the help system and the manuals until we had everything sorted out. With the med device folks, all I had to do was remind the product manager (who was a first-to-market kind of guy) that, by not pressing us to meet a date but, rather, by supporting us to write the right tips, alerts, and so on into the product, he would be a hero when it came time to demo the product to the legal department and to the company's most important (and most fussy) customer.

Keeping in focus—like a research scientist

So, keeping your focus on the company's success is like being a research scientist. Do not engage in any activity that does not directly influence the research question (or, in this case, the company's strategic plan, its priorities, and its core values).

Question: How do you become a better listener?

You said that you ask questions about your client's needs and objectives, and then you just listen. You do this instead of giving the client a long-winded dissertation on your skills and experience. So what suggestions do you have on becoming a more receptive listener on the job?

dgh. Please know that I'm not being sassy with this answer. The way to become a better, more receptive listener is to just be quiet. People will tell you what they need and what they expect.

I won't go on about the skills and traits of an active listener. There are plenty of articles on that. Your job is to hear what your customer's pain is. You need to understand what the effect of that pain is. This comes from asking the right questions, listening, and asking more right questions.

Asking the right questions

The "right questions" are those that are in the customer's language and are taken from the customer's perspective. Your job is to be smart enough to be able to translate their experiences, their viewpoints, and their expectations into your language and to create actionable solutions from all of it.

You will restate a lot of what the speaker just said. You will be asking questions like, "Is that what you meant?" And when you think you've got it all figured out, you will then offer something like, "You said 'thus and such.' As I said earlier, this sounds to me like 'this and that.' If you still agree that I have the right take on all of this, then it seems to me that we [key word] should [whatever you think the solution is]. Don't you agree?"

Through this exercise, you have demonstrated you listened to them, you heard them, and you are keen to partner with them on taking their pain away. People want you to listen for just a couple of reasons: to keep them from talking to themselves (in which case you don't have to come up with any solutions) or to help them with a solution.

Question: How do you market your skills?

You said that contractors need to be their own sales and marketing staff. As an employee, how do you market your skills within the company to do work that you think is important but may not be on the top of your manager's priority list, such as assisting with the company training videos?

dgh. See my answer to how not to be complacent. Look at what I say about knowing what your company's priorities and core value are. Also, read [my article in the April newsletter]. And listen. (Kind of neat how all this stuff ties together, huh?)

Making your manager look like a hero

The quickest way to get something high on your manager's list is to understand her priorities and her pain and look for ways to meet her priorities and take away her pain.

It's not about you. It's about her. It's about making her look like a hero to her manager. (Among the things I do regardless of whether I'm an employee or a consultant is move heaven and earth in order to make my client—whether that is my boss or my customer—look like a hero to the folks who matter to him or her.)

Getting your manager to connect the dots

Also, help your manager to connect the dots. For example, if you help with the company training videos, you will be able to apply adult learning theory that you witness when you work with the instructional designers to your own work, thus making it more meaningful and actionable for your end users. By assisting with the training videos, you will be able to bring your intimate knowledge of information architecture and the product to the table and help the folks you're working with gain new skills and competencies.

I think you get the picture.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Dear Tek Wright

Return Home

The "Dear Abby" of the technical communication world, Tek Wright dispenses valuable advice about the interpersonal conflicts felt by those who work in the technical communication field. Tek understands your frustrations of office relationships, computer interactions, and everyday emotions and feelings. Tek can't help you format a word doc, but Tek can help you dispense the stress built up from forcing Word to do your bidding.

Dear Tek:

I work with an impossible individual. You know the type—pushy, overbearing, always right, unbending. This type insists on their own way and is cooperative only if it serves their purpose—an all-around annoying person. To make matters worse, while they annoy the dickens out of me, they do their job perfectly.

What can I do to make this person see that their unsolicited advice and constant negative attitude make me want to quit my job?

Thank you,

Can't-get-my-work-done-as-I-am-too-busy-fuming-over-what-my-co-worker-just-said

Dear Fuming:

Having a problem communicating with a co-worker can make every day in the office a battle. The ability to get along with people and adapt to different personalities and types of people we encounter are key components to survival in any environment.

While rising to the continual challenge of getting along can take its toll on you, don't quit your job just yet, as there are solutions. Also, while we are all grown up now, not all of us are mature. Getting help (such as from HR or your manager) with the situation may not always be an option, so you must find your own solutions.

I offer these solutions that help in all kinds of situations—not just work—at home, at church, where you volunteer, in the supermarket line, or even on the highway.

- Always treat others as you would like to be treated: in other words, don't stoop to their level regardless of how mad you get.

- Be polite; say thank you even if the advice is unsolicited.

- Try to understand where the person is coming from, and acknowledge it: if you are able to, remove yourself from their issue—after all, it isn’t your problem that they are having a problem. But they feel that something you did is making their problem worse. Don't apologize for their problem, but say something like "I understand your concern about the project, but . . . ."

- Gather the courage to confront the person with constructive criticism: let them know that you don't appreciate the way they treat you, and ask if there is a problem. More often than not, they don't even realize their own behavior. After clearing the air, you will both feel better. By the way, do this in private; it is not a time to be a drama queen.

- Check your own attitude: with a few minor changes to your own reaction (yes, reaction), you can accept the situation without becoming angry.

Yours,

Tek Wright

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

Return Home

Most Likely to Write a Humor Column

By Karen Field Carroll

Author Bio

Contact Karen

Every June, I think I have unresolved issues. As the year's crop of high school seniors ponder their prom attire and scrutinize what Weird Willie wrote in their yearbook when their so-called best friend Sheila gave it to him supposedly by accident, I feel a pang of regret. You see, motivated by the sheer tedium of high school, I attended summer school and shucked the catty cackles of general education in December of my senior year. So I wasn't around for the spring semester antics. It seemed like a good idea at the time. But now I realize what I missed: the prom, "senior skip day," and those empirically defining popularity contests.

It's the latter that still gnaws at me. I won no popularity contests, not even "most likely to snub her peers by graduating early." But maybe it's not too late for me.

Keeper, as I am, of the job "most likely to be seen as boring" by nontechnical types, I've conducted my own popularity contests. Extracting certain grating phrases from reams of end-user guides and holding them up here as pillars of bad writing, I've tried to expel that last seed of bitterness from my tortured soul. Here, then, are my picks.

- **"Phrase most likely written by a constipated English butler with gender identity issues":** *wish to*, as in "If you wish to exit now, open the File menu and click Exit."

- **"Phrase most likely written by a psychologist-turned-tech-writer":** *enables you to*, as in "The Save dialog box enables you to save your document now."

- **"Transitive verb most likely to be used intransitively":** *displays*, as in "The Open dialog box displays." Runner-up: *installs*, as in "The program installs on your hard drive."

- **"Phrase most likely written by a nun turned technical writer":** *allows you to*, as in "The application allows you to order credit reports over the Internet."

There. I feel better. Well, sort of. But I'd still like to know what Weird Willie meant by writing, "Too bad I didn't want to know you better." And how come I never received an invitation to my 10-year reunion?

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

[Return Home](#)

Book Review

Meeting the Challenge of the Rhetorical Situation

A Review of Charles Kostlenick's and David D. Roberts' *Designing Visual Language: Strategies for Professional Communicators*

Reviewed by [Richard Garner](#)

[Author Bio](#)

[Contact Richard](#)

Designing Visual Language: Strategies for Professional Communicators by Charles Kostlenick and David D. Roberts is a thorough and worthwhile analysis and presentation of the strategies that may be used by professional communicators for the visual design of their documents. It is part of a series of textbooks for students in undergraduate and graduate programs in technical communication.

Before we begin the process of visual design, the authors say, we must consider the rhetorical situation we face. This consists of the audience for our communications, their purpose, and the context.

Kostlenick and Roberts describe how design elements can be organized in responding to this rhetorical situation according to the following six strategies:

- arrangement
- emphasis
- clarity
- conciseness
- tone
- ethos

Arrangement

Arrangement is defined as the "order or organization of visual elements so that readers can see their structure—how they cohere in groups, how they differ from one another, and how they create layers and hierarchies."

One possible arrangement strategy might include the numbering of different parts of the text. Another might consider the spatial relationships among different parts.

Emphasis

Emphasis strategies take into account that some parts of a communication are more important than others. The prominence or intensity of expression that reflects this is what is meant by *emphasis*. Emphasis strategies are about controlling what stands out and occurs on screen as well as in print.

Clarity

Clarity strategies help the receiver of a communication "decode the message, understand it quickly and completely, and, when necessary, react without ambivalence."

Conciseness

Conciseness refers to the visual bulk and intricacy of the design, e.g., the number of headings and lists, lines and boxes, and colors and gray scales; the detail of drawings and data displays; and the variations in size, ornateness, and spacing of the text.

Tone

The tone of a document refers to the attitude of the communicator that is conveyed towards her or his readers and the subject. This comes across visually as well as verbally. You can sound serious, humorous, excited, concerned, technical, and so on.

Ethos

In any communication, the speaker or writer tries to establish a trusting relationship with the listener or reader. To do that, they need to cultivate a sense of character or credibility that will appeal to their audience. This is what is meant by *ethos*.

These different strategies for organizing the visual design of professional communications are interdependent, the authors say.

Kostlenick and Roberts describe how visual communication is governed by certain conventions or expectations that readers of different types of documents will tend to have. Professional communicators need to identify what these conventions are, consider how rigid or flexible they are, and think about them in terms of their readers, who give them meaning and significance.

The authors also describe how perception issues affect visual communication. Gestalt principles of design, i.e., the study of figure-ground organization, is among these.

They present a taxonomy for the visual analysis of documents. This taxonomy distinguishes the different levels of design. They are:

- intra
- inter
- extra
- supra

Intra

Intra-level design refers to the linear components, the most basic elements of text design.

Inter

Inter-level design refers to the fields that text is organized into and the nonlinear components of local design.

Extra

Extra-level design concerns data displays, pictures, icons, and symbols.

Supra

Supra-level design concerns how parts of the document as a whole fit together and make for usability.

In the rest of the book, the authors analyze how their six strategies for organizing visual design can be applied at these four different levels of design. At each level, they describe how the application of their strategies involves trade-offs or striking a balance that is appropriate to the particular rhetorical situation.

They also describe how the application and development of their strategies involves first analyzing the rhetorical situation and then inventng, revising, and visually editing.

The text is supplemented throughout by illustrations that help demonstrate the points.

There could be a more lengthy discussion in this book of how the use of color might be relevant to the use of these different design strategies. In addition, the authors do not discuss how best to integrate visual design with the use of language. (Although we do not want their number to be excessive, words remain the most important element of technical communication.)

However, this book is an invaluable source of knowledge of visual design so the technical communicator can find their own way to integrate visual and verbal rhetoric.

June 2004

Chapter Membership

Return Home

What's new in membership?

By Sue Heim, VP Membership

Welcome to our new members—whether new to STC or to our San Diego Chapter. And congratulations to our new senior members (those who have held the grade of member in STC for five years).

New Members

Lista A. Duren

John P. Elmore

Yvonne E. Esquivel

Susan Garcia

Philip Gunderson

Caryn Hecht

Evic R. Oropilla

Sergio Ramirez

Paul Wilson

Member Transferred to San Diego

Ann Cornuelle

Reinstated Members

Sally R. Altman

Ann Campi

Linda Eskin

Bonni Graham

Barbara W. Klaser

Richard G. Scheiner

Hank Stanley

New Senior Members

Deborah D. Gill-Hesselgrave

Mark D. Hall

Lance-Robert

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

Thanks to Contributors and Welcome to Incoming Managing Editor

By Catherine Robinson, Outgoing Managing Editor

As most of you know, this is my last issue as managing editor of *Signature*. Jennifer and I have been rewarded many times with the opportunity to work with a wonderful newsletter staff, all the contributing authors, and other volunteers who shared their experiences, passed on technical advice, and supported us. Thank you for a wonderful season.

Thanks to Contributors

We would like to thank all those who made this a great newsletter season with their valued contributions. We had a great newsletter season because of the contributions of those noted below, especially our wonderful copyeditors.

- *Beth Vollbach*, copyeditor
- *Pam Fridie*, copyeditor
- *Karen Field Carroll*, author and book reviewer
- *Jeff Freeman*, author
- *Theresa Freese*, proofreader
- *Richard Garner*, author and book reviewer
- *Deborah Gill-Hesselgrave*, author
- *Bonni Graham*, Region 8 director-sponsor, author
- *Mark Hall*, author and proofreader
- *Karie Hebert*, proofreader
- *Eric Hurd*, meeting reviewer and photographer
- *Suzanne Hosie*, proofreader
- *Julie Kinyoun*, book reviewer
- *Lance-Robert*, author

- *Jennifer Mallory*, assistant managing editor
- *Kitt Medrano*, author and proofreader
- *Kelley Wilson Mesterharm*, author and Web site supporter
- *Bonnie Nicholls*, proofreader
- *Fabrizio Scippa*, graphics and photo-touchups assistant
- *Susan Self*, author
- *Matt Sullivan*, author
- *Gail Van Landingham*, author
- *Lana Walker-Helmuth*, author

The *Signature* newsletter needs your talents to continue the excellence of the *Signature* newsletter next season.

Please contact us at stcsignature@yahoo.com to help us line up next year's publishing season.

Welcome to Incoming Managing Editor

We would like to welcome Carole Johnson as the incoming managing editor of *Signature* newsletter for the upcoming 2004-2005 season. As Managing Editor, Carole plans to work with the staff to continue to deliver a quality newsletter.

Thank you for a great season. I look forward to seeing all of you next year!

Calling All Contributors!

By Carole Johnson, Incoming Managing Editor

The *Signature* newsletter needs your talents to continue the excellence of the *Signature* newsletter next season. I, too, want to thank all the volunteers who contributed to the newsletter’s success this year and to those volunteers going forward into the next publishing season.

If you can volunteer in any capacity, your efforts will help the STC organization continue to publish an excellent newsletter that helps its members stay connected and grow in the profession.

Changes are being considered concerning publication methods, including the types of articles and frequency of newsletter content. If you can volunteer in any capacity, we need to hear from you. If you want to contribute new ideas or skills, we welcome your suggestions and would like to hear from you.

Please contact the newsletter staff at stcsignature@yahoo.com to help us line up the new season, which is in the planning stages now and will begin to publish in the fall.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

President's Podium

Return Home

So long!

By Walter Hanig, President

Author Bio

Contact Walter

Administrative Council

This is my last column as president of the San Diego Chapter of STC. I've seen many changes over my two years as president preceded by four years as treasurer. Most have been positive from my perspective.

For examples:

- The chapter is in outstanding financial shape. The issue, if you want to call it that, is deciding how to spend to bring the most benefit to the most members. I and next year's council welcome your ideas.

- We've gone to a buffet dinner for chapter meetings. This has simplified the reservations and check-in process while simultaneously improving the meals.

- We've changed the meeting location to Mission Valley. Though this location has made it impossible for some members to attend, we've had better service and accommodations. Perhaps we'll return to Sorrento Valley if circumstances change.

- More services have been automated. We handle reservations for chapter meetings online and accept PayPal payments. So, check-in is faster, and there's less handling required for cash and checks.

- The newsletter has gone online. We've not only saved a sizable cost item, we've had greater flexibility in the number and placement of articles. Additionally, previous issues are accessible.

- We've experimented with different methods of professional development, from negotiating discounts at local educational firms to subsidizing STC's telephone seminars. These approaches, unfortunately, don't go as far as we'd like. Ideally, we should have more workshops presented by chapter members or industry experts.

- The evolution of chapter leadership has continued with almost none of the most active chapter leaders from six years ago still active. This isn't a bad thing. New people bring new ideas, and you can't have too many of those.

Just as there are changes at the chapter level, there are major changes in the works at the Society level. This transformation has been triggered by the sense that STC is becoming less relevant to past, current, and prospective members and to our employers and sponsors.

The net result has been diminishing membership and financial challenges for the overall organization and many chapters. The transformation is a work in progress, and I plan to share the information I have at the June meeting.

What's next for me? I'll still likely attend chapter meetings to keep up with all of you as well as learn from the presenters. I'd like to participate in the transformation effort, perhaps as a liaison between the chapter and the Society. And I can probably be persuaded to help with restaurant recommendations at the 2005 Region 8 conference.

Thanks to all of you for your work on behalf of the chapter, your friendship, and your counsel these past years.

Return Home

Feature | Editor's Desk | President's Podium
Advice | Dear Tek Wright | Book Review
Humor | Chapter Meetings
Mission | Author Bios | Newsletter Staff | San Diego Chapter Council Members

June 2004

Sponsorship Opportunities

Return Home

Sponsorship Opportunities

By Michael Cárdenas, VP Programs

Contact Michael

Would you like to promote your company, get your company name recognition, and, at the same time, help the San Diego STC Chapter? Well, we have an excellent opportunity for you!

Your company can sponsor a monthly meeting. You will have your company logo and name on the San Diego STC Web site; you will get additional recognition at the STC meeting; and you will have a minute or two to present your company's products and services to the meeting attendees.

The cost per presentation is $150. This includes dinner for one attendee, who must register in advance of the meeting.

Please contact Michael Cárdenas for sponsorship opportunities: Phone 619.295.2682 or email mcardenas@multitrans.com.

Return Home