the Quill
the Newsletter for the Southwestern Ontario Chapter STC

OCTOBER 2005 (Volume 17 Number 2) About the Quill

In This Issue

The Editor's Message

Hello and welcome to the October issue of The Quill! Hurricane season is here, at least for the American Gulf Coast, and, in the wake of the terrible devastation of Katrina and Rita, I find myself thinking about the vital role of communications in our lives.

Evacuate, but how?

Unlike the tsunami last boxing day, we had warning these weather systems were coming, and that New Orleans was in grave danger of being "drowned" by a category 4 or 5 hurricane. The Discovery channel ran programs on it—in fact my husband saw a program just a week before the storm hit. Clearly, the knowledge was there, but was this communicated to the people it affected most? I don't think so. The working poor, and the poor in health were left in the dark —literally.

The government said "evacuate", but they did not provide the means for the majority of the population to get out of New Orleans. The buses did not come until days after the disaster hit. Pandemonium, violence, looting, and unspeakable human behaviour ensued. The air was thick with frustration and anger. Even the mayor had a few choice words for the politicians who were unable to jump in and help because they were too busy talking to television cameras.

Rita makes her entrance...

Did we learn from this? When Rita came along a few weeks later, people certainly paid more attention to it. And, there were plenty of buses to evacuate the affected cities—Houston and Galveston. The problem now was that the highways were so jammed, no one could get for granted?

Membership Update

Leanne Rollins, Membership Manager, talks about how our chapter has a great mixture of new and veteran members, including one new member and two new "senior" members!

General Meeting Announcements

Read about what is coming up for the November (can you say DITA?) and December (Structured FrameMaker and XML, oh my) meetings...

Résumé Service

Does your résumé need a makeover? Did you know the Toronto Chapter STC offers a full résumé review and workshop service for STC members?

Favourite Bumper Sticker of the Month:

anywhere very quickly. People ran out of gas, and were pushing or abandoning their cars just to get out of the line of Rita's fire. The exodus was painfully slow, and horribly disorganized. Again, people were angry and frustrated.

Lessons learned?

Maybe in this day and age of seemingly endless possibilities of communicating, we have taken communication for granted. We give people half the story, and expect them to figure out the rest. As leaders, you need to back up your words with actions—plan, write, review, test, edit—and make sure you know AND provide the means to reach the audience.

Don't underestimate the power of communication; it can have a profound effect on lives.

Have any examples you'd like to share about how communications has affected lives? Send your articles, suggestions, and comments to me, Margie, at quill@stc-soc.org.

Creating and supporting a forum for communities of practice in the profession of technical communication

About The Quill

by Margie Yundt, The Quill Editor

The Quill is the monthly newsletter of the Southwestern Ontario Chapter STC, which is a Canadian chapter in Region 1. Our chapter spans from Windsor to Mississauga and Georgian Bay to Lake Ontario. This area is home to the technology triangle, which is home to many high-tech industries.

The Quill History

In October 1989, the first edition of the The Goose was launched by editor Rick Martin, who immediately announced a contest for a new name. The winning entry was, of course, The Quill. Within two years, The Quill earned an Achievement Award for small chapter newsletters, followed by back-to-back Merit Awards in **1993** and **1994**. **1992** and **2001** saw Awards of Excellence. In **1996**, we were awarded not only the Distinguished Award, but the Best of Show for all chapter newsletters. In **2003**, our first year in an online format, we won a Merit Award. In **2004**, we won Most Distinguished, Most Improved, and STC Best of Show.

Publication Policies and Frequency

The Quill is published monthly, with the exception of January, so there are nine issues published from September 2005 to June 2006.

The following is a summary of when articles must be submitted so that they can be included in a particular issue. To help the Quill Editor to plan the content of each issue, contributors are encouraged to submit their story ideas one week before submitting their articles.

Issue	Article Deadline
September	August 23
October	September 19
November	October 17
December	November 21
January	No Quill
February	January 23
March	February 20

April	March 20
May	April 17
June	May 22
July or August	No Quill

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Mission Statement:

Creating and supporting a forum for communities of practice in the profession of technical communication

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In this issue:

President's Message: Can I have a Word with You?

by Debbie Kerr, President

I remember when I wanted to appear interesting and it was okay to be a little different. Now, with words having double meanings, when I leave the room and people say, "She's interesting," then I know to take offense.

Being different may mean that you stand out from others, but you don't want to be labeled "different", because that usually means that there is no other politically correct word that is available to describe you. Being labeled as "interesting" or "different" is no longer good, but bad.

That leads me to the word "bad". It's one of those words that can be either good or, well, bad. If I were cool, which I am not, and I told you that you were bad, I could be giving you a compliment. My kids on the other hand take the word at face value when they hear it from me. They don't even try to turn it into a compliment.

A Change in Spelling

I've also noticed that spelling has evolved over time. Two separate words or hyphenated words usually become one word over time. I couldn't believe it when I was reading a Dr. Seuss book to my son (many years ago) and "to-day" was hyphenated. And, while "Web site", "web site", and "website" are not used consistently, I know that eventually "website" will become the standard as it becomes more and more familiar. Familiarity doesn't just bring people together; it also seems to bring things closer together, including the spaces and the hyphens within words. I just wonder, with there being fewer spaces after periods, and the number of spaces between letters and words decreasing, how long will it be before there are no spaces between any words? It sounds like something out of the book "1984".

Evolving Like Words

In addition to spelling evolving, the words themselves also evolve. Words that were once cool can make you look like a geek if you use them at the wrong place and time. Tell someone, "It's the cat's meow!" and see if everyone thinks you are cool or just in a time warp. Hopefully no one thinks that your skills are in a time warp.

Keeping up with the times means that we have to look at ourselves and take stock of our skills. We have to know the technology and have the skills that we need to complete the job. Sometimes it's a matter of using the same skills in a different way, and in other cases, it's acquiring a whole new set of skills. It's a bonus when you get to reinvent and acquire skills at the same time, which is what I got to do most recently.

For the more than twenty years that I have been doing technical communication, I have been writing manuals and help files. Over the last couple of years, there has been a shift in how my skills are being used. In the last two years, I have been writing user interface design specifications that are being used to develop a web-based software application for an insurance company. From that I have transitioned to writing Customer Requirements Specifications (CRS) that will be used when planning which projects to complete in the upcoming year. The person who read my CRS said she knew I wrote the vision because it was very clearly written and easy to understand. That comment in itself shows that the skills used for technical writing are definitely transferable, and I got to try something new. I have now been introduced to the world of function points and lived to tell about it.

The people at work are quite excited that one person might be able to take a project through all its phases instead of having a "different" person complete each of the phases. Isn't it "interesting" that it might be me? Would it be great if the words different and interesting could have a good meaning again, especially as it relates to my work experience? I'll have to let you know in next month's installment of the president's message.

About Debbie Kerr (President)

In the 20 years that Debbie has been writing documentation, she has worked in a variety of industries: government, retail, software, and insurance. She is currently employed at The Economical Insurance Group in Kitchener writing design specifications. Debbie has been a member of the STC since 1994 and has held several council positions over the last three years.

Barry Clegg Goes Head to Head with Information

by Dennis O'Keeffe

As a technical writer, there are times when I think I'm alone. The job of a technical writer must be easier at other companies. I'm sure that other companies are team oriented; engineers and programmers don't turn and run when they see a technical writer headed their way. Surely they send e-mail to keep technical writers in the loop, or perhaps they invite writers for coffee to explain the latest developments in the project. At other companies, the programmers must send technical writers screen captures with an explanation of their intricate details. And surely, co-workers don't ask, "What is a technical writer?" or "What do you do, exactly?" My sense of isolation regarding these matters was eased on Tuesday, September 6 when I attended the Southwestern Ontario Chapter's first general meeting of the season.

The beginning of the end for mediocre

The guest speaker, Barry Clegg, described the problems he encountered at his former workplace. This company had a large body of technical information that wasn't conveyed clearly to its customers, co-workers, or management. Barry explained that, in its complacency, the company had developed a tolerance for mediocre, outdated, or non-existent technical documentation.

Upon realizing this problem, Barry spoke to his boss and volunteered to hold an information session on the topic of technical writing, called, "Going Head to Head with Information". This information session was held over the lunch hour and offered tips on documenting technical data. Other offerings included free sandwiches and juice. Is there a better way to lure suspicious or disinterested co-workers into the realm of technical writing?

Defining technical writing and identifying its benefits

During the course of the session, Barry had to explain the purpose of technical writing and why it's important. "Crikey!" I muttered to myself. Is Barry talking about his workplace experience or mine? How does he explain it? I cocked an attentive ear.

Barry described the process of technical writing as the explanation of difficult or sensitive ideas by using a combination of words, diagrams, and illustrations. He gave a few examples of what good technical documentation can do for a company: reduce maintenance costs; speed up customers' acceptance of manufactured equipment; and help sales. Conversely, poor technical documentation can: damage sales; increase training costs; increase maintenance costs; and give the company a negative image. This all sounded convincing to me and was somewhat familiar, but how do you make "them" understand? Barry repeated several times that he didn't work with stupid people; he worked with people who had a tendency to act stupidly. So the challenge was getting his co-workers to convey technical information in a manner that would produce positive results for the company.

Looking for answers in the right places

To do this, he thought the challenge was to have people think "outside the box"; however, with the present state of things he would be happy if his co-workers thought inside the box. For example, one of his co-workers preferred to use pie charts to illustrate complicated data. Barry, however, proved that using simple bar graphs was a much more effective means of expressing the same data. In this case, there was no need for Barry's co-worker to invent a new method of conveying his data; he merely had to adopt an alternative method that had always been available. Thus, Barry saw no need to re-invent the way his co-workers expressed technical data; instead, they needed to use available methods more succinctly. He explained that simple instructions accompanied by a simple diagram made data more easily understood.

The legacy is clear

Barry ran four information sessions where he distributed technical communication packages, including a condensed copy of technical writing tips. His reward for these efforts was the realization that some of his co-workers became more aware of the job of a technical writer and the need for a clear, concise explanation of technical information. Co-workers began to bring him documents for advice on how to organize them and to clearly explain their technical information. After Barry left the company, the Human Resources department included technical writing sessions in the orientation of new employees. These sessions were based on those formerly presented by Barry.

Possible solutions

As a title, "Going Head to Head with Information" conjures up feelings of conflict; however, Barry explained his true intent: many technical people have difficulty documenting their own projects in a manner that is easily understood. In some cases technical people don't have strong language and writing skills; and some have no interest in the writing process at all. Moreover, some engineers and programmers believe that no one else can do it for them, because they, themselves, are the subject matter experts. So how is the problem of inadequate or non-existent technical documentation resolved? Encouraging technical people to clearly document their own projects is one solution to the problem. However, Barry presented a second solution.

Barry made it clear to his former boss and to the company's Human Resources department that there are hundreds of technical writers in every region of the province who can transform technical information into technical manuals. He questioned whether hiring a technical writer could be less expensive than having a technical person design, build, and document a project on his or her own. Barry used spreadsheets of data to investigate this question, and, in the end, he proved to his boss that hiring a full-time technical writer would be more cost effective for the company. Thus, Barry was able to recommend that the Human Resources department hire a technical writer.

Conclusion

Although the title of Barry's information session may have suggested it, he had no intention of being confrontational or raising the image of conflict in his workplace. In his opinion, the conflict existed between technical information and those who were responsible for organizing and re-writing it. How does one gather it, organize it, and express it clearly? Although I identify with this challenge, I can't help thinking that perhaps Barry was touching on the other half of the problem: how to extract this information from subject matter experts who are not always willing to share it. These people, themselves, could be seen as the information with which technical writers must go head to head. I thought about this possibility and then asked myself, "So am I really alone, or am I just sore in the head?"

About Dennis O'Keeffe

Dennis O'Keeffe is a technical writer at Automation Tooling Systems (ATS) in Cambridge, Ontario.

Council Meeting Minutes: September 20th

by emily layng, Recorder/Secretary

Hello again. Here I am with the monthly recap of the Council meeting. With the closing of the CheckFree office in Waterloo, this was our last opportunity to meet at the venue where we met all of last year. We're really going to miss the place, and we are grateful that we got to use it for as long as we did. Lori and Peter will soon no longer be working for CheckFree and will be starting their own consulting business together. We wish them all the best in their new venture.

Attendees

The first regular council meeting of the new year was a smaller group than usual. Those who successfully made it to the council meeting were: Debbie Kerr (President), Ursula McCloy (Employment Manager), Carol Lawless (Treasurer), Heidi Marr (Student Awards Manager), Lori Jankowski (Public Relations Manager), and me, emily layng (Recorder/Secretary). Some of the members that could not attend succumbed to the pressures of the fall flu season. Even one of the attendees, Carol, our treasurer, was technically sick, but since we were reviewing the budget, she sat as far away as possible and refrained from touching or breathing on any of the pizza. What devotion.

Illness aside, the meeting got under way at 6:45 pm, and it started with some administrative details like meeting times, locations, and selection of pizza.

Budget Overview

We then proceeded to the more time consuming and critical stuff like the budget. Carol had prepared a more simplified version of the budget than in previous years and she handed out a paper copy to each of the attendees. We then went through each line of the budget to see where we could reduce costs so that we could spend more money in other places, like the education workshop.

There was much haranguing and gnashing of teeth as we wrangled the budget into submission. *Wrangled* is now my favorite word, by the way, I heard it a couple of weeks ago and it keeps popping into my conversation. Please excuse me.

Budget Challenges

While our chapter is in better financial shape than many other chapters, we wanted to start our year with a balanced budget. When we were discussing the budget, the challenge was trying to predict how people would react to the choices that would be made later about the education workshop that would take place in February. If you have ever bought a house, you know that you are excited about buy a house but your hand shakes when you write the cheque.

Balancing the budget is the same thing. It's a fine line between finding a great speaker that will get people excited about coming to our workshop and making the commitment to spend that kind of money to get that person to come. It's also a challenge when the amount of membership rebates is lower than it has been in previous years. The wrangling part was deciding how much we could spend and still make enough money to balance the budget.

Other Items

While the budget was one of the main items on the agenda, there were a few other items that we discussed.

- Donald is busily collecting door prizes from several local businesses, so look forward to some cool prizes at the general meetings in the future. If your company has some door prizes to donate, contact Donald at program@stc-soc.org.
- The Education workshop/seminar is scheduled for February 16th and 17th in 2006 at the same location as last year. We have discussed some great speakers, but if you have some ideas about whom you would like to see, contact Kim Creed at education@stc-soc.org. Also watch our website for online polls relating to our education workshop.
- Some changes are being made to the awards for the Heidi Theissen Student Awards. Stay tuned for details.

The meeting wrapped up at 8:20 and we were on our way.

emily layng (Secretary/Recorder)

Emily is currently working at ATS, in Cambridge, and has recently been promoted to Team Leader of Systems 1. As part of a busy group, long days and short weekends are the norm. She has been a technical writer since 1996, and has created documentation for both hardware and software companies. Outside of ATS, she is involved with a local Astrology group that is putting together correspondence courses for learning Astrology.

Freelance 101: Chronicles for the Self-Employed

by Leanne Rollins, Membership Manager

What are you worth?

Last month I asked Quill readers for some input on the next topic for this article. Apparently we all struggle with project estimating, because the overwhelming majority asked about scoping a project, costing it out, and presenting the result to a prospective client.

It's a fact that preparing an estimate is stressful. When you freelance, it's not just your writing that builds your reputation—it's also your ability to forecast and then stay within budget. Despite my experience as both a captive employee and as a freelancer, I still second-guess my estimates each time I prepare a proposal. Will the client think I am way out of the ballpark? Am I under-cutting my services? What parameters have I missed that might cause me to blow the budget?

When I quoted on my first freelance project, I completely under-cut my services not on rate but on time required. I hadn't yet figured out my page-per-hour average and basically provided a pie-in-the-sky proposal that met the clients' required (and unreasonable) date. In painful reality, I worked three 80-hour weeks to pull off the project, but I managed to come in on budget and time. Despite the sleepless week, I learned a few things:

- Under-cutting isn't necessarily a bad thing. This client has come back to me for three additional projects, each one larger than the last.
- Take time to really think about your productivity. Hackos states that you need five hours per page for a User Guide, four hours per page for a Reference Guide, and **four** hours per topic for online help. I've found that I actually need **three** hours per page for a User Guide and **two** hours per page for a Reference Guide. The help metric is pretty accurate, especially if it's context sensitive and if I have to fight with RoboHelp.
- Take time to find out what you are getting yourself into. Ask MANY questions before you sign on to a project, including who your resources will be, who your main point of contact will be, and how you get paid. With my first client, I neglected to find out their accounting policy, so it took over two months before I finally received a cheque. It was a lean couple of months.

Per hour or per project?

Everyone struggles to decide the best way to estimate a project. Remember that most companies will require a dollar cap on a project, especially if the company must cut a P.O before you can invoice. So even if you estimate per hour, you need to give the client a reasonable estimate of the number of hours needed. I always quote per project, but I put a very obvious caveat in my proposal that states something like “if the number of hours consumed reaches within 10% of the total budget due to scope increase, the client must agree to allocate an additional number of hours to the project at x rate.” Most clients don’t even blink at this clause, but one did and gave me a hard time about it. I refused to remove the clause, and the client eventually signed it. Fortunately, we didn’t need extra budget but I hate to think about what might have happened if we did.

To have even a hope of estimating a project you MUST probe for any and all existing material that the client can provide up front. I sign an NDA before the client even agrees to hire my services so that I can get a copy of the software (or device in some cases), copies of the specs if they have any, and I talk to the client and developers on my dime. All told, I invest about six hours of my precious time (free of charge) before I can prepare a proposal that I am confident about. In some cases, I include a clause in the proposal that states the client will also agree to pay for my discovery work if they hire my services. That depends on the client though, and on the scope of the project.

Once I have a very good annotated outline of either the help system, book, or training modules, I apply the per page rationale. So, if my outline indicates a 100-page User Guide, and my working rate is three hours per page, that’s a total of 300 hours. Apply the dollar rate (say $60/hour), and we’re looking at a cool $18,000.

To calculate duration, also know the number of hours you are able to work in a week. If you plan to work 40 hours per week, divide 300 hours by 40 hours and you’ll get the number of weeks needed to complete the project. Make sure you add a little breathing room for slight changes in scope!

If the client faints at the thought of spending $18,000 on a mere User Guide, remind him/her that hiring a full-time employee to perform this task would cost somewhere in the ballpark of $25,000. (A full-time employee earning $60,000 per annum actually costs the company an additional $100,000 in overhead each year. Divide $160,000 by 52 weeks, then multiply the result by the number of weeks you estimated for the project. You should come in significantly less, and if not, re-think your proposal!)

What else do I put in a proposal?

Each time I complete a project, I learn a little more about what I should have included in the proposal. Here's a brief synopsis of what I typically include:

- **General project details**—client name, address, contact name. I also include a clause stating the expiry of the proposal (usually 7 days after submitted).
- **Purpose of the project**—make sure you know what the client is trying to accomplish with this project. Is it to increase sales? Is it to correct program functionality? Is it to satisfy user demands for documentation? Tailor your proposal to the clients interests, never your own!
- **Annotated outline**—for each component in the project (guide, help, training, etc.) provide an annotated outline, and an estimate (usually a range) of the number of topics or pages required at the chapter level. Also provide a brief description of each component and how the component will help the client reach their goal.
- **Authoring tools**—forget your own preferences and really think about the tool that is best for the client. If the client plans to maintain the documents on their own after you hand it off, don't encourage them to move to Framemaker. Use Word. Really. If on the other hand, the document you are creating will exceed 100 pages, don't make yourself nuts trying to use Word book files. If you can make a good case to the client, include a sub-proposal for teaching a staff member to use Framemaker at the end of the project. If you need a specialized tool—say RoboHelp or Dreamweaver, and you do not own the tool, include the cost as a line item within your proposal. If the client questions it, let them know that they will need the license to make any future modifications anyway, so they might as well purchase it up front.
- **Required resources**—provide a complete list of human and material resources that you will need to complete this project on time and on budget. List the interviews that you will need, the software, access to their system or network, contact with their customers, existing documentation, etc.
- **Template**—in many cases, smaller organizations do not have a style guide nor a 'look and feel' for their printed documents. In this case, I include creation of the style sheet and template within the proposal as a separate line item. I usually provide two different templates that they can choose between, or modify as needed.

- **Reviews and Revisions**—detail the method, amount of time, and resources required to provide reviews of your work. Also detail the number of revisions you are willing to provide, and a cut-off date for submitting changes. If you don't include the cut-off date, the client can and will make you crazy with the 'could you just change one more little thing' requests after the project deadline has come and gone.
- **Start Date and Completion Date**—let the client know when you can begin, and also your rationale for the duration of the project. If you are working on more than one project at a time, remember that if you estimate 8 weeks, but the other project is also 8 weeks, you need a total of 16 weeks to complete both projects (if they are weighted equally).
- **Cost**—breakdown your rationale for the cost of the project into a simple chart. Don't forget to include a plus GST statement if you are required to collect GST.
- **Communication and billing**—list all methods you will use to communicate status to the client. I submit a weekly report each Friday that informs the client of my progress for the week, the amount of hours logged that week, the amount of budget consumed, and the amount of budget remaining. I also provide a statement like 'on budget and on schedule' to let the client know that things are going according to plan. Make sure you include a section here about how you will invoice—monthly, bi-monthly, at the end of the project. Ask the client to provide the name and contact information for the Accounts Payable clerk at the company. This person can make the difference between getting paid eventually and getting paid on time.
- **Project Schedule**—propose a schedule and include real dates for drafts, meetings, interviews, etc.
- **Signatures**—always include a signature page at the end of the proposal, with space for both the client and yourself to sign. It doesn't hurt to ask the client to initial every page also.

Two last bits of advice:

1. **Remember that your proposal is also a writing sample.** Take the time to spell check and edit before you submit it. You may not get a second chance to make a first writing impression.
2. If you can afford to do so, **have a lawyer take a quick look at your proposal template**. If a client defaults on payment, it's comforting to know that your signed proposal will stand up in court.

Once again, let me know if there is any topic in particular you'd like to me to cover next month. Email me at leanne@leannerollins.com with your input.

About Leanne Rollins

Leanne recently became a self-employed contractor, escaping management roles for the first time in years. This newfound freedom has allowed Leanne to take on extra-curricular activities such as a more active role in the STC. When not writing or playing with her kids, Leanne enjoys running and soccer.

In this issue:

It's In the Numbers: Using Metrics to Plan Documentation Projects

by Sherry McMenemy and Margie Yundt

This article originally appeared in TechCom Manager, an online publication for Documentation Managers.

It's in the numbers. Creating documentation is not an exact science, yet as communication leaders, we are expected to provide real estimates for how long we need to document a project, or what we can produce out given a predetermined timeline.

Using a simple Planning Tool, you can improve the accountability of your team and accurately plan documentation projects to gain:

- **More accurate project estimates**. With time, you should be able to estimate when your team can deliver on a particular project and better allocate resources for each project.
- **A clear and specific explanation when things take longer than they "should have"**. Provided that you update the Planning Tool for a project if any of the factors change, you'll know which factors changed the delivery time. As best practice, it's best to retain the original calculations so that you can compare your estimate against actual results during the course of the project.
- **A great way to justify new resources, budget for contractors, or to just say "no"**. Conversations about money and resources are so much easier when you know exactly how long something will take and can factor that into the time/resources available to you.
- **The ability to make strategic decisions**. Using the Planning Tool, you'll have the ability to compare different delivery channels (print versus online, for example) along with other factors such as templates, edit levels and so on. Where you have room to adjust the scope of the project, you can do so based on reasonably accurate metrics.

Another more subtle benefit to be gained in taking this approach to documentation planning may be in strengthening the reputation of your department. If your department is seen to be reliable and deliver on its promises, you retain the faith (and the support) of your stakeholders.

The Science of Doc Metrics – Estimating How Long It Takes

Every team is different, and how long it takes to write a document depends on a variety of – believe it or not – measurable factors. However, weighting those factors can be entirely relative.

The key to creating meaningful metrics is tailoring them to your team, its environment, and lessons learned from previous projects. There is no magic formula – you must create your own solution, then test and retest your "tool" until you have perfected the results. Your goal should be to have measurable and predictable planning metrics that are easy to use (and then use them!).

This article presents a Planning Tool that we've developed for our documentation projects. Ours is still a tool in progress, but we're happy to share what we've got so far…

Start With a Purpose

Document metrics can help you to predict (with reasonable accuracy) how long a project should take, and/or determine how much you can get done within a specified timeline. Good planning metrics may also help you determine (and justify) when to bring in a contractor…or even when to say "no" to a project.

Build It

Step 1: Determine Important Factors

Unfortunately, there is no "one size fits all" set of factors or weighted values. So when we sat down to come up with a Planning Tool, we determined the factors that impact our projects.

Some background information is important here: our team is specialized in internal documentation and we primarily build small-to-medium sized instructional documents, as well as online documents for training/reference. We decided to build this tool in Microsoft Excel, where we could use basic macros to calculate the totals for us.

The factors we included in our Planning Tool include:

Factor	Description
Document size	Print: # of pages Online: # of topics
Production level	New: create content, edit, format New: content provided, edit, format Update: add some new content; edit, format Update: edit, format only
Complexity	Low, medium or high
Format	Microsoft Word, Microsoft Visio, HTML, Other
Template Requirements	New template Existing template Revise template with document No template

Graphics	None < 5 5-10 > 10
Delivery channel	Print/PDF Online (HTML, CBT) Word document Multiple formats
Review cycle	# reviewers/stakeholders Full reviews required (content/structure/proof) Content reviews only Proof only (spelling, grammar)

The first factor – Document size – is the number we use as the base value for the rest of the calculations. Within each category, a weighted value is set for the option selected. The total number in the tool is the “number of hours” required to complete the project:

Base Project

		Weight	Total
Size of Document:			
# of pages	40	0.3	12
# of topics (use for **online** only)	0	0.15	0.0
Subtotal:			**12.0**
Choose <u>one</u> item in each category:			
Type of Document			
New: create content, edit, format	☑	1	12.00
New: content provided, edit, format	☑	0.5	6.00
Update: add NEW content, edit & format	☑	0.75	9.00
Update: edit & format only	☑	0.25	3.00
Complexity of Content			
Low	☑	0.25	3.00
Medium	☑	0.5	6.00
High	☑	1	12.00

Note: *To show you the weights, we’ve selected all options in each category. When using the tool, we select one option only in each category.*

From there, it’s pretty easy to convert that number to other useful time estimates such as “number of person days” or “number of person weeks”.

For larger teams or teams with a wide range of experience, you may consider adding “experience level” as an additional factor (or even “familiarity with content” to account for a learning curve).

Step 2: Figure Out the Weights

The easiest way to figure out how to weight the factors you include in your Planning Tool is to set a "base weight" of 1 for the most common option in each category. Then, compare the other options and add or subtract weight based on your experience (we keep it at increments of ".25" to keep things simple).

You will use these "weights" to calculate the totals for each item, so be prepared to adjust them until you get reasonable time estimates for each project factor.

Step 3: Calculate Your Totals

The last step in creating your spreadsheet is calculating the totals from what you have entered into a meaningful, and reasonably accurate, estimate. You don't need to be a math whiz to play with these numbers—a common sense approach here works best. This exercise does not need to be complicated, so keep it as simple as possible.

Keep in mind the following as you create your formulae:

- Have all your totals related to only one factor: page and/or topic count; don't overcomplicate the formula by adding in other relationships or factors.
- If you have to "fudge" totals, or apply a "fudge" factor to attain more reasonable totals, something is wrong with your weights—adjust the weights, not the totals.

To test your spreadsheet, use the tool to calculate a time estimate for projects that you've already completed. Use projects where you have good information regarding the factors involved and know how long it actually took to complete the project.

Compare the "actual" results with the "predicted" results of your new Planning Tool. The more projects you are able to plug into the tool, the more accurate the tool becomes.

Step 4: Use It and Test It Again

Okay, here's the crucial part: everyone must use the tool, for every project AND everyone must track projects as they work on them, based on the factors in your tool. Sounds simple enough, right?

How Do I Know When I've "Got It"?

Your Planning Tool is good once there is a reasonable level of accuracy in its ability to predict how long a project will take. However, make sure that you update the tool to account for new delivery channels, new types of documents or any other changes that may impact how accurate the tool is. Think of it as a "work in progress"—just as our work environment evolves, so must our Planning Tool.

What we've found as we continue to develop this tool is that it encapsulates our experience in a format that is reusable and extendible into the organization. These meaningful metrics are helping us to better serve our customers and better manage resources.

This is only one approach, and specific to our team at Research In Motion, but there are other companies in the area using their own measurement tools, such as Campana Systems. For more information about their methodology for creating documentation estimates, contact Holly Curtis at hkc@campana.com.

Happy number crunching...

About Sherry McMenemy

Sherry McMenemy is a senior STC member and manages RIM's Knowledge Operations team. She spends much of her time on strategic knowledge management, application/web UI and communications. At home, she's all about renovations, reading, and watching anything by Joss Whedon.

About Margie Yundt

Margie is the Editor for The Quill, an active member of the STC council, and since graduating form the University of Waterloo in the early '90s, has been working as a technical communicator and documentation/project manager. When she is not "online", Margie enjoys hanging out with her two children and watching the Amazing Race with her husband.

In this issue:

View from the Other Side: The Observational Tourist

by Nancy Halverson, Feature Writer

As the whirlwind that is my life settles a little, I'll take a little time to tell you about some of the things I've been noticing in my travels.

I've just returned from Canada—my family were so incredibly happy to share in my mother's joy at finding love at 69. She and her new husband make a great couple and it's wonderful to see a permanent smile on her face.

The ENORMITY of it all

We also spent a few days in Waterloo after the wedding (in Peterborough County)—so comfortable to be in the place we think of as 'home'. I was once again amazed at the spaciousness of everything from homes to roadways—even the parks seem so huge! And we finally figured out that the big yellow thing in the sky was actually the sun!

One thing that we were disturbed by however was the shear number of huge cars that are on the road – who needs all these militarized vehicles like the Hummers and the enormous SUV's? How much gas do they take to move along the road? Coming from the narrow roads and tiny parking spaces in Europe and especially in England, it's really a shock to see these tanks and 'battlestars' moving around in so much space. It's probably a perception thing...

(I have actually seen a Hummer on the street here in England though – it dwarfed everything but the double-decker buses and must take up three British parking spaces! And there are more and more Chrysler Voyagers and Jeeps being added to the Range Rovers etc, so even when gas prices are two and a half times what they are in Waterloo, some people are still convinced that they need the battlestars. I think it's an oil company plot.)

I understand, no really

Other than the blue skies and lovely fall weather we had while we were 'home', it was a real pleasure to understand almost everything everyone said. I guess we're tuned to certain accents, but even people who speak to me in any other accents (German, Vietnamese, French Canadian) in Canada I can grasp their meaning without asking for a repetition. Maybe I resist the English (or Yorkshire) accents, but I still have difficulty. I'll admit that if someone says something to me here and I don't understand it, I simply nod and smile—which I didn't need to do once while I was in Canada! I never knew how much of a relief that would be... and I think it's that type of thing that makes 'home' so comfortable—wherever 'home' may be for anyone.

On being "tourists"

As our kids were fairly young when we moved to England (7 and 5) they never remembered going to Niagara Falls. The Falls are one of the quintessential Canadian experiences for most people from this side of the pond. So, we took a day to schlep the girls to see Niagara – and it was fabulous. We went on the Maid of the Mist (which I've never done!) and we did the tunnels under the falls. Both experiences are very wet, but not too much different from a rainy day here in Sheffield—except that the mist tended to blow from the direction of the falls, rather than swirl around like the rain vortex that usually happens here!

It's incredible how much we all enjoyed our day as tourists—I'm usually a tourist snob—I don't go in for the 'been there, done that' stuff, nor do Ryan or I like the commercial side of tourism. We spend the money on getting as close to the 'real thing' as possible, and leave all the periphery to others. So going on the Maid of the Mist was a natural, although we'd never taken the time before. The girls loved it all—the grandeur, and immense power of the water going over the cliff lived up to their expectations. I marveled at how few times we've actually been there—I felt like saying 'we have to go more often'. It's really an incredible site that anyone who grows up in that part of the world becomes entirely too immune to—the same as the Romans get bored with the archeological digs and ancient monuments.

Going round and round...

I am impressed that some roundabouts have been added to the road system in Waterloo—they're not as scary as you think they are! Actually, most roundabouts keep traffic moving very well—you just have to make sure that you look to your left before going into one. It's a difficult thing to communicate to new 'users' though—the signs were quite funny. You need to keep in mind though that you can be in a roundabout at the same time as other cars, since all of them are moving in the same direction. Some friends here at ZOOtech have shown me the scariest roundabout ever—it's a good reason for me to avoid Swindon I figure—maybe it's a population control thing, it seems so patently dangerous! But, if more simple roundabouts were used in North America, traffic would probably move smoothly. I got very tired of sitting in a lineup to get through intersections—I never thought it would be so boring!

Oh yeah, the STC

The year for our STC group here has begun—we're trying to put together four one-day events this year. It's a very interesting (read busy) year shaping up for me. I'm not sure that I'll survive really, but we'll give it a shot.

Our first one-day event is set for Nov 19 in Coventry. We're bringing over an American XML and DITA guru—Alan Houser. Since I'm the VP, and charged with co-ordinating the event, I'm pretty much on the hot seat to get this conference booked and profitable. Next, I've got something to put together for Sheffield for the spring. If you've got any advice for me—all you successful program managers, I'd really appreciate it!

About Nancy Halverson

Nancy grew up in Toronto, but has lived in Ottawa, Melbourne, Waterloo, and now Sheffield. She has travelled through the South Pacific, Australia and Indonesia, which is where she met her husband, Ryan Wilson (another Canadian), along the way.

A career switch introduced her to the STC in 1997. Her writing experience has included several contract positions and a position at Inscriber for several years. She has two daughters and has been living in England for over two years.

In this issue:

Contents | President's Message | Head to Head | Council Meeting Minutes | Freelance 101 | In the Numbers | View from the Other Side | Membership Update | General Meeting Announcements | Resume Service

Membership News

by Leanne Rollins, Membership Manager

I was thrilled to meet several new chapter members at last month's meeting. Although I have been issuing personal invitations to each new member encouraging them to come out to a general meeting, I know that putting yourself 'out there' in a new situation with new people can be very intimidating. I think this is the very reason that the council agreed I should be membership manager this year—I'm the least physically imposing person you could hope to meet (well, other than Opal anyway).

New members represent new ideas and talent within our chapter. We're also at a point now in our chapter history where we have an amazing blend of veteran members and new members. Recent statistics sent out by our chapter president, Debbie Kerr, show that of our 152 members, 32 people have been members of the STC for at least 10 years.

With a 21% veteran membership, there is a great deal of talent to draw on, and we often ask these veterans to speak at monthly meetings. But just because you are a new(er) member does not mean you are new to the field.

I want to hear from those within our membership who joined the STC within the past two years, but have been in the industry for five or more years. Email me a brief biography, and let me know why you eventually decided to join the STC. I'll include selected biographies in this membership article over the next few months.

This month we welcome **Richard Gagnon** to our chapter. We also congratulate our members, **Debbie Davy** and **Chet Skibinski**, on becoming senior members of the STC. This change in membership status occurs when someone has been a member of the STC for five years.

Again, new members, please come check out a meeting, and make sure you find me and say hello! Veteran members, you are still encouraged to find me and let me know what's new.

About Leanne Rollins

Leanne recently became a self-employed contractor, escaping management roles for the first time in years. This newfound freedom has allowed Leanne to take on extra-curricular activities such as a more active role in the STC. When not writing or playing with her kids, Leanne enjoys running and soccer.

General Meeting Announcements

November 1 DITA as an Authoring Format for Technical Information

So what the heck is DITA? Darwin Information Typing Architecture (DITA) provides maps for assembling topics into deliverables. By specializing the map elements, you can define a formal information architecture for your deliverables.

This architecture provides guidance to authors on how to organize topics and lets processes recognize your organizing principles, resulting in a consistent, clear experience for your users.

Join us @ the University of Waterloo Davis Centre, Room DC 1304 7:00 PM (doors open at 6:30 PM)

Michael Priestley is one of the XML architects of the Darwin Information Typing Architecture (DITA), with specific focus on its specialization and map architectures. He is also an information architect and tools specialist for Rational software in IBM. He has written numerous papers on information design, architecture, single-sourcing, and information development processes.

December 6th Document Development with Structured FrameMaker and XML on a Small Budget

Would you like to break into the world of XML, but you don't have much time or money? Come to the December general meeting to learn about tools to help you:

- Get information from SMEs in electronic format and seamlessly import it into your desktop publishing tool
- Manage reviewers in remote locations
- Produce both HTML and PDF from a single source
- Develop documentation for the popular Eclipse development environment.

Let Fei Min introduce you to some neat tools that will help you achieve your goals more efficiently. If your documentation department is looking for a low-cost entry point to using XML that has a minimal impact on your production schedule, she'd got a practical solution.

Join us @ the University of Waterloo Davis Centre, Room DC 1304 7:00 PM (doors open at 6:30 PM)

Fei Min Lorente has been a technical writer for over 15 years and has worked with different tools from General Markup Language (GML) on a mainframe to Word on a MacIntosh. She has often had to take a leadership role in developing new processes and researching new tools for producing documentation. She has worked in the database, defence, oil and gas, banking and semiconductor industries. She is currently the lone writer at AMI Semiconductor Canada Company, the Volunteer Coordinator for the Southwestern Ontario chapter, and one of the editors for the CIC SIG. She considers herself a programming dilettante.

In this issue:

Contents | President's Message | Head to Head | Council Meeting Minutes | Freelance 101 | In the Numbers | View from the Other Side | Membership Update | General Meeting Announcements | Resume Service

Need a Résumé Makeover?

Are you having trouble finding work in technical writing, and want free résumé and job search advice? A STC Toronto member, Pamela Paterson, provides proven advice for the tough job market. For résumé advice and to set up a session, visit:

http://www.writertypes.com/resources.htm

To use this free service, you must be a member of the STC Toronto or Southwestern Ontario chapters.

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Contents | President's Message | Head to Head | Council Meeting Minutes | Freelance 101 | In the Numbers | View from the Other Side | Membership Update | General Meeting Announcements | Resume Service

the Quill
the Newsletter for the Southwestern Ontario Chapter STC

OCTOBER 2005 (Volume 17 Number 2) About the Quill

In This Issue

President's Message

President Debbie Kerr takes an interesting look at the evolution of words and her career as a writer (thus far). You may look at technical communication in an entirely "different" way.

Barry Clegg Goes Head to Head with Information

Did you miss September's general meeting? Barry Clegg talked about how a company missed the mark when it came to documenting technical information until he helped them to see the light. Even Dennis, the technical writer who summarized the event, found out that he was not alone in his quest to educate co-workers about our noble profession.

Council Meeting Minutes

Read about what your council discussed at its September meeting. Hot topics included budget wrangling and the upcoming Education Day.

Freelance 101: Chronicles for the Self-Employed

This month Leanne Rollins demonstrates that proposal writing is a fine art, and that winning those proposals involves some sound strategy..

It’s In the Numbers: Using Metrics to Plan Documentation Projects

Want to know more about the 'science' of creating documentation estimates? This article provides step-by-step instructions for building metrics that work for you and your organization.

View from the Other Side: The Observational Tourist

Nancy is back and talks about her observations while traveling on this side of the pond. Are we taking our home

The Editor's Message

Hello and welcome to the October issue of The Quill! Hurricane season is here, at least for the American Gulf Coast, and, in the wake of the terrible devastation of Katrina and Rita, I find myself thinking about the vital role of communications in our lives.

Evacuate, but how?

Unlike the tsunami last boxing day, we had warning these weather systems were coming, and that New Orleans was in grave danger of being "drowned" by a category 4 or 5 hurricane. The Discovery channel ran programs on it—in fact my husband saw a program just a week before the storm hit. Clearly, the knowledge was there, but was this communicated to the people it affected most? I don't think so. The working poor, and the poor in health were left in the dark—literally.

The government said "evacuate", but they did not provide the means for the majority of the population to get out of New Orleans. The buses did not come until days after the disaster hit. Pandemonium, violence, looting, and unspeakable human behaviour ensued. The air was thick with frustration and anger. Even the mayor had a few choice words for the politicians who were unable to jump in and help because they were too busy talking to television cameras.

Rita makes her entrance...

Did we learn from this? When Rita came along a few weeks later, people certainly paid more attention to it. And, there were plenty of buses to evacuate the affected cities—Houston and Galveston. The problem now was that the highways were so jammed, no one could get for granted?

Membership Update

Leanne Rollins, Membership Manager, talks about how our chapter has a great mixture of new and veteran members, including one new member and two new "senior" members!

General Meeting Announcements

Read about what is coming up for the November (can you say DITA?) and December (Structured FrameMaker and XML, oh my) meetings...

Résumé Service

Does your résumé need a makeover? Did you know the Toronto Chapter STC offers a full résumé review and workshop service for STC members?

Favourite Bumper Sticker of the Month:

anywhere very quickly. People ran out of gas, and were pushing or abandoning their cars just to get out of the line of Rita's fire. The exodus was painfully slow, and horribly disorganized. Again, people were angry and frustrated.

Lessons learned?

Maybe in this day and age of seemingly endless possibilities of communicating, we have taken communication for granted. We give people half the story, and expect them to figure out the rest. As leaders, you need to back up your words with actions—plan, write, review, test, edit—and make sure you know AND provide the means to reach the audience.

Don't underestimate the power of communication; it can have a profound effect on lives.

Have any examples you'd like to share about how communications has affected lives? Send your articles, suggestions, and comments to me, Margie, at quill@stc-soc.org.

Creating and supporting a forum for communities of practice in the profession of technical communication

About The Quill

by Margie Yundt, The Quill Editor

The Quill is the monthly newsletter of the Southwestern Ontario Chapter STC, which is a Canadian chapter in Region 1. Our chapter spans from Windsor to Mississauga and Georgian Bay to Lake Ontario. This area is home to the technology triangle, which is home to many high-tech industries.

The Quill History

In October 1989, the first edition of the The Goose was launched by editor Rick Martin, who immediately announced a contest for a new name. The winning entry was, of course, The Quill. Within two years, The Quill earned an Achievement Award for small chapter newsletters, followed by back-to-back Merit Awards in **1993** and **1994**. **1992** and **2001** saw Awards of Excellence. In **1996**, we were awarded not only the Distinguished Award, but the Best of Show for all chapter newsletters. In **2003**, our first year in an online format, we won a Merit Award. In **2004**, we won Most Distinguished, Most Improved, and STC Best of Show.

Publication Policies and Frequency

The Quill is published monthly, with the exception of January, so there are nine issues published from September 2005 to June 2006.

The following is a summary of when articles must be submitted so that they can be included in a particular issue. To help the Quill Editor to plan the content of each issue, contributors are encouraged to submit their story ideas one week before submitting their articles.

Issue	Article Deadline
September	August 23
October	September 19
November	October 17
December	November 21
January	No Quill
February	January 23
March	February 20

April	March 20
May	April 17
June	May 22
July or August	No Quill

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Articles contained in this newsletter may be reprinted if credit is given to The Quill and the author of the article. You must also submit an electronic copy of the article to The Quill Editor at quill@stc-soc.org OR mail two paper copies to the mailing address below.

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For a complete list of contacts, go to the site of the Southwestern Ontario Chapter STC at www.stc-soc.org.

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Mission Statement:

Creating and supporting a forum for communities of practice in the profession of technical communication

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President's Message: Can I have a Word with You?

by Debbie Kerr, President

I remember when I wanted to appear interesting and it was okay to be a little different. Now, with words having double meanings, when I leave the room and people say, "She's interesting," then I know to take offense.

Being different may mean that you stand out from others, but you don't want to be labeled "different", because that usually means that there is no other politically correct word that is available to describe you. Whether being labeled as "interesting" or "different" is no longer good, but bad.

That leads me to the word "bad". It's one of those words that can be either good or, well, bad. If I were cool, which I am not, and I told you that you were bad, I could be giving you a compliment. My kids on the other hand take the word at face value when they hear it from me. They don't even try to turn it into a compliment.

A Change in Spelling

I've also noticed that spelling has evolved over time. Two separate words or hyphenated words usually become one word over time. I couldn't believe it when I was reading a Dr. Seuss book to my son (many years ago) and "to-day" was hyphenated. And, while "Web site", "web site", and "website" are not used consistently, I know that eventually "website" will become the standard as it becomes more and more familiar. Familiarity doesn't just bring people together; it also seems to bring things closer together, including the spaces and the hyphens within words. I just wonder, with there being fewer spaces after periods, and the number of spaces between letters and words decreasing, how long will it be before there are no spaces between any words? It sounds like something out of the book "1984".

Evolving Like Words

In addition to spelling evolving, the words themselves also evolve. Words that were once cool can make you look like a geek if you use them at the wrong place and time. Tell someone, "It's the cat's meow!" and see if everyone thinks you are cool or just in a time warp. Hopefully no one thinks that your skills are in a time warp.

Keeping up with the times means that we have to look at ourselves and take stock of our skills. We have to know the technology and have the skills that we need to complete the job. Sometimes it's a matter of using the same skills in a different way, and in other cases, it's acquiring a whole new set of skills. It's a bonus when you get to reinvent and acquire skills at the same time, which is what I got to do most recently.

For the more than twenty years that I have been doing technical communication, I have been writing manuals and help files. Over the last couple of years, there has been a shift in how my skills are being used. In the last two years, I have been writing user interface design specifications that are being used to develop a web-based software application for an insurance company. From that I have transitioned to writing Customer Requirements Specifications (CRS) that will be used when planning which projects to complete in the upcoming year. The person who read my CRS said she knew I wrote the vision because it was very clearly written and easy to understand. That comment in itself shows that the skills used for technical writing are definitely transferable, and I got to try something new. I have now been introduced to the world of function points and lived to tell about it.

The people at work are quite excited that one person might be able to take a project through all its phases instead of having a "different" person complete each of the phases. Isn't it "interesting" that it might be me? Would it be great if the words different and interesting could have a good meaning again, especially as it relates to my work experience? I'll have to let you know in next month's installment of the president's message.

About Debbie Kerr (President)

In the 20 years that Debbie has been writing documentation, she has worked in a variety of industries: government, retail, software, and insurance. She is currently employed at The Economical Insurance Group in Kitchener writing design specifications. Debbie has been a member of the STC since 1994 and has held several council positions over the last three years.

In this issue:

Barry Clegg Goes Head to Head with Information

by Dennis O'Keeffe

As a technical writer, there are times when I think I'm alone. The job of a technical writer must be easier at other companies. I'm sure that other companies are team oriented; engineers and programmers don't turn and run when they see a technical writer headed their way. Surely they send e-mail to keep technical writers in the loop, or perhaps they invite writers for coffee to explain the latest developments in the project. At other companies, the programmers must send technical writers screen captures with an explanation of their intricate details. And surely, co-workers don't ask, "What is a technical writer?" or "What do you do, exactly?" My sense of isolation regarding these matters was eased on Tuesday, September 6 when I attended the Southwestern Ontario Chapter's first general meeting of the season.

The beginning of the end for mediocre

The guest speaker, Barry Clegg, described the problems he encountered at his former workplace. This company had a large body of technical information that wasn't conveyed clearly to its customers, co-workers, or management. Barry explained that, in its complacency, the company had developed a tolerance for mediocre, outdated, or non-existent technical documentation.

Upon realizing this problem, Barry spoke to his boss and volunteered to hold an information session on the topic of technical writing, called, "Going Head to Head with Information". This information session was held over the lunch hour and offered tips on documenting technical data. Other offerings included free sandwiches and juice. Is there a better way to lure suspicious or disinterested co-workers into the realm of technical writing?

Defining technical writing and identifying its benefits

During the course of the session, Barry had to explain the purpose of technical writing and why it's important. "Crikey!" I muttered to myself. Is Barry talking about his workplace experience or mine? How does he explain it? I cocked an attentive ear.

Barry described the process of technical writing as the explanation of difficult or sensitive ideas by using a combination of words, diagrams, and illustrations. He gave a few examples of what good technical documentation can do for a company: reduce maintenance costs; speed up customers' acceptance of manufactured equipment; and help sales. Conversely, poor technical documentation can: damage sales; increase training costs; increase maintenance costs; and give the company a negative image. This all sounded convincing to me and was somewhat familiar, but how do you make "them" understand? Barry repeated several times that he didn't work with stupid people; he worked with people who had a tendency to act stupidly. So the challenge was getting his co-workers to convey technical information in a manner that would produce positive results for the company.

Looking for answers in the right places

To do this, he thought the challenge was to have people think "outside the box"; however, with the present state of things he would be happy if his co-workers thought inside the box. For example, one of his co-workers preferred to use pie charts to illustrate complicated data. Barry, however, proved that using simple bar graphs was a much more effective means of expressing the same data. In this case, there was no need for Barry's co-worker to invent a new method of conveying his data; he merely had to adopt an alternative method that had always been available. Thus, Barry saw no need to re-invent the way his co-workers expressed technical data; instead, they needed to use available methods more succinctly. He explained that simple instructions accompanied by a simple diagram made data more easily understood.

The legacy is clear

Barry ran four information sessions where he distributed technical communication packages, including a condensed copy of technical writing tips. His reward for these efforts was the realization that some of his co-workers became more aware of the job of a technical writer and the need for a clear, concise explanation of technical information. Co-workers began to bring him documents for advice on how to organize them and to clearly explain their technical information. After Barry left the company, the Human Resources department included technical writing sessions in the orientation of new employees. These sessions were based on those formerly presented by Barry.

Possible solutions

As a title, "Going Head to Head with Information" conjures up feelings of conflict; however, Barry explained his true intent: many technical people have difficulty documenting their own projects in a manner that is easily understood. In some cases technical people don't have strong language and writing skills; and some have no interest in the writing process at all. Moreover, some engineers and programmers believe that no one else can do it for them, because they, themselves, are the subject matter experts. So how is the problem of inadequate or non-existent technical documentation resolved? Encouraging technical people to clearly document their own projects is one solution to the problem. However, Barry presented a second solution.

Barry made it clear to his former boss and to the company's Human Resources department that there are hundreds of technical writers in every region of the province who can transform technical information into technical manuals. He questioned whether hiring a technical writer could be less expensive than having a technical person design, build, and document a project on his or her own. Barry used spreadsheets of data to investigate this question, and, in the end, he proved to his boss that hiring a full-time technical writer would be more cost effective for the company. Thus, Barry was able to recommend that the Human Resources department hire a technical writer.

Conclusion

Although the title of Barry's information session may have suggested it, he had no intention of being confrontational or raising the image of conflict in his workplace. In his opinion, the conflict existed between technical information and those who were responsible for organizing and re-writing it. How does one gather it, organize it, and express it clearly? Although I identify with this challenge, I can't help thinking that perhaps Barry was touching on the other half of the problem: how to extract this information from subject matter experts who are not always willing to share it. These people, themselves, could be seen as the information with which technical writers must go head to head. I thought about this possibility and then asked myself, "So am I really alone, or am I just sore in the head?"

About Dennis O'Keeffe

Dennis O'Keeffe is a technical writer at Automation Tooling Systems (ATS) in Cambridge, Ontario.

Council Meeting Minutes: September 20th

by emily layng, Recorder/Secretary

Hello again. Here I am with the monthly recap of the Council meeting. With the closing of the CheckFree office in Waterloo, this was our last opportunity to meet at the venue where we met all of last year. We're really going to miss the place, and we are grateful that we got to use it for as long as we did. Lori and Peter will soon no longer be working for CheckFree and will be starting their own consulting business together. We wish them all the best in their new venture.

Attendees

The first regular council meeting of the new year was a smaller group than usual. Those who successfully made it to the council meeting were: Debbie Kerr (President), Ursula McCloy (Employment Manager), Carol Lawless (Treasurer), Heidi Marr (Student Awards Manager), Lori Jankowski (Public Relations Manager), and me, emily layng (Recorder/Secretary). Some of the members that could not attend succumbed to the pressures of the fall flu season. Even one of the attendees, Carol, our treasurer, was technically sick, but since we were reviewing the budget, she sat as far away as possible and refrained from touching or breathing on any of the pizza. What devotion.

Illness aside, the meeting got under way at 6:45 pm, and it started with some administrative details like meeting times, locations, and selection of pizza.

Budget Overview

We then proceeded to the more time consuming and critical stuff like the budget. Carol had prepared a more simplified version of the budget than in previous years and she handed out a paper copy to each of the attendees. We then went through each line of the budget to see where we could reduce costs so that we could spend more money in other places, like the education workshop.

There was much haranguing and gnashing of teeth as we wrangled the budget into submission. *Wrangled* is now my favorite word, by the way, I heard it a couple of weeks ago and it keeps popping into my conversation. Please excuse me.

Budget Challenges

While our chapter is in better financial shape than many other chapters, we wanted to start our year with a balanced budget. When we were discussing the budget, the challenge was trying to predict how people would react to the choices that would be made later about the education workshop that would take place in February. If you have ever bought a house, you know that you are excited about buy a house but your hand shakes when you write the cheque.

Balancing the budget is the same thing. It's a fine line between finding a great speaker that will get people excited about coming to our workshop and making the commitment to spend that kind of money to get that person to come. It's also a challenge when the amount of membership rebates is lower than it has been in previous years. The wrangling part was deciding how much we could spend and still make enough money to balance the budget.

Other Items

While the budget was one of the main items on the agenda, there were a few other items that we discussed.

- Donald is busily collecting door prizes from several local businesses, so look forward to some cool prizes at the general meetings in the future. If your company has some door prizes to donate, contact Donald at program@stc-soc.org.
- The Education workshop/seminar is scheduled for February 16th and 17th in 2006 at the same location as last year. We have discussed some great speakers, but if you have some ideas about whom you would like to see, contact Kim Creed at education@stc-soc.org. Also watch our website for online polls relating to our education workshop.
- Some changes are being made to the awards for the Heidi Theissen Student Awards. Stay tuned for details.

The meeting wrapped up at 8:20 and we were on our way.

emily layng (Secretary/Recorder)

Emily is currently working at ATS, in Cambridge, and has recently been promoted to Team Leader of Systems 1. As part of a busy group, long days and short weekends are the norm. She has been a technical writer since 1996, and has created documentation for both hardware and software companies. Outside of ATS, she is involved with a local Astrology group that is putting together correspondence courses for learning Astrology.

In this issue:

Freelance 101: Chronicles for the Self-Employed

by Leanne Rollins, Membership Manager

What are you worth?

Last month I asked Quill readers for some input on the next topic for this article. Apparently we all struggle with project estimating, because the overwhelming majority asked about scoping a project, costing it out, and presenting the result to a prospective client.

It's a fact that preparing an estimate is stressful. When you freelance, it's not just your writing that builds your reputation—it's also your ability to forecast and then stay within budget. Despite my experience as both a captive employee and as a freelancer, I still second-guess my estimates each time I prepare a proposal. Will the client think I am way out of the ballpark? Am I under-cutting my services? What parameters have I missed that might cause me to blow the budget?

When I quoted on my first freelance project, I completely under-cut my services not on rate but on time required. I hadn't yet figured out my page-per-hour average and basically provided a pie-in-the-sky proposal that met the clients' required (and unreasonable) date. In painful reality, I worked three 80-hour weeks to pull off the project, but I managed to come in on budget and time. Despite the sleepless week, I learned a few things:

- Under-cutting isn't necessarily a bad thing. This client has come back to me for three additional projects, each one larger than the last.
- Take time to really think about your productivity. Hackos states that you need five hours per page for a User Guide, four hours per page for a Reference Guide, and **four** hours per topic for online help. I've found that I actually need **three** hours per page for a User Guide and **two** hours per page for a Reference Guide. The help metric is pretty accurate, especially if it's context sensitive and if I have to fight with RoboHelp.
- Take time to find out what you are getting yourself into. Ask MANY questions before you sign on to a project, including who your resources will be, who your main point of contact will be, and how you get paid. With my first client, I neglected to find out their accounting policy, so it took over two months before I finally received a cheque. It was a lean couple of months.

Per hour or per project?

Everyone struggles to decide the best way to estimate a project. Remember that most companies will require a dollar cap on a project, especially if the company must cut a P.O before you can invoice. So even if you estimate per hour, you need to give the client a reasonable estimate of the number of hours needed. I always quote per project, but I put a very obvious caveat in my proposal that states something like "if the number of hours consumed reaches within 10% of the total budget due to scope increase, the client must agree to allocate an additional number of hours to the project at x rate." Most clients don't even blink at this clause, but one did and gave me a hard time about it. I refused to remove the clause, and the client eventually signed it. Fortunately, we didn't need extra budget but I hate to think about what might have happened if we did.

To have even a hope of estimating a project you MUST probe for any and all existing material that the client can provide up front. I sign an NDA before the client even agrees to hire my services so that I can get a copy of the software (or device in some cases), copies of the specs if they have any, and I talk to the client and developers on my dime. All told, I invest about six hours of my precious time (free of charge) before I can prepare a proposal that I am confident about. In some cases, I include a clause in the proposal that states the client will also agree to pay for my discovery work if they hire my services. That depends on the client though, and on the scope of the project.

Once I have a very good annotated outline of either the help system, book, or training modules, I apply the per page rationale. So, if my outline indicates a 100-page User Guide, and my working rate is three hours per page, that's a total of 300 hours. Apply the dollar rate (say $60/hour), and we're looking at a cool $18,000.

To calculate duration, also know the number of hours you are able to work in a week. If you plan to work 40 hours per week, divide 300 hours by 40 hours and you'll get the number of weeks needed to complete the project. Make sure you add a little breathing room for slight changes in scope!

If the client faints at the thought of spending $18,000 on a mere User Guide, remind him/her that hiring a full-time employee to perform this task would cost somewhere in the ballpark of $25,000. (A full-time employee earning $60,000 per annum actually costs the company an additional $100,000 in overhead each year. Divide $160,000 by 52 weeks, then multiply the result by the number of weeks you estimated for the project. You should come in significantly less, and if not, re-think your proposal!)

What else do I put in a proposal?

Each time I complete a project, I learn a little more about what I should have included in the proposal. Here's a brief synopsis of what I typically include:

- **General project details**—client name, address, contact name. I also include a clause stating the expiry of the proposal (usually 7 days after submitted).
- **Purpose of the project**—make sure you know what the client is trying to accomplish with this project. Is it to increase sales? Is it to correct program functionality? Is it to satisfy user demands for documentation? Tailor your proposal to the clients interests, never your own!
- **Annotated outline**—for each component in the project (guide, help, training, etc.) provide an annotated outline, and an estimate (usually a range) of the number of topics or pages required at the chapter level. Also provide a brief description of each component and how the component will help the client reach their goal.
- **Authoring tools**—forget your own preferences and really think about the tool that is best for the client. If the client plans to maintain the documents on their own after you hand it off, don't encourage them to move to Framemaker. Use Word. Really. If on the other hand, the document you are creating will exceed 100 pages, don't make yourself nuts trying to use Word book files. If you can make a good case to the client, include a sub-proposal for teaching a staff member to use Framemaker at the end of the project. If you need a specialized tool—say RoboHelp or Dreamweaver, and you do not own the tool, include the cost as a line item within your proposal. If the client questions it, let them know that they will need the license to make any future modifications anyway, so they might as well purchase it up front.
- **Required resources**—provide a complete list of human and material resources that you will need to complete this project on time and on budget. List the interviews that you will need, the software, access to their system or network, contact with their customers, existing documentation, etc.
- **Template**—in many cases, smaller organizations do not have a style guide nor a 'look and feel' for their printed documents. In this case, I include creation of the style sheet and template within the proposal as a separate line item. I usually provide two different templates that they can choose between, or modify as needed.

- **Reviews and Revisions**—detail the method, amount of time, and resources required to provide reviews of your work. Also detail the number of revisions you are willing to provide, and a cut-off date for submitting changes. If you don't include the cut-off date, the client can and will make you crazy with the 'could you just change one more little thing' requests after the project deadline has come and gone.
- **Start Date and Completion Date**—let the client know when you can begin, and also your rationale for the duration of the project. If you are working on more than one project at a time, remember that if you estimate 8 weeks, but the other project is also 8 weeks, you need a total of 16 weeks to complete both projects (if they are weighted equally).
- **Cost**—breakdown your rationale for the cost of the project into a simple chart. Don't forget to include a plus GST statement if you are required to collect GST.
- **Communication and billing**—list all methods you will use to communicate status to the client. I submit a weekly report each Friday that informs the client of my progress for the week, the amount of hours logged that week, the amount of budget consumed, and the amount of budget remaining. I also provide a statement like 'on budget and on schedule' to let the client know that things are going according to plan. Make sure you include a section here about how you will invoice—monthly, bi-monthly, at the end of the project. Ask the client to provide the name and contact information for the Accounts Payable clerk at the company. This person can make the difference between getting paid eventually and getting paid on time.
- **Project Schedule**—propose a schedule and include real dates for drafts, meetings, interviews, etc.
- **Signatures**—always include a signature page at the end of the proposal, with space for both the client and yourself to sign. It doesn't hurt to ask the client to initial every page also.

Two last bits of advice:

1. **Remember that your proposal is also a writing sample.** Take the time to spell check and edit before you submit it. You may not get a second chance to make a first writing impression.
2. If you can afford to do so, **have a lawyer take a quick look at your proposal template**. If a client defaults on payment, it's comforting to know that your signed proposal will stand up in court.

Once again, let me know if there is any topic in particular you'd like to me to cover next month. Email me at leanne@leannerollins.com with your input.

About Leanne Rollins

Leanne recently became a self-employed contractor, escaping management roles for the first time in years. This newfound freedom has allowed Leanne to take on extra-curricular activities such as a more active role in the STC. When not writing or playing with her kids, Leanne enjoys running and soccer.

It's In the Numbers: Using Metrics to Plan Documentation Projects

by Sherry McMenemy and Margie Yundt

This article originally appeared in TechCom Manager, an online publication for Documentation Managers.

It's in the numbers. Creating documentation is not an exact science, yet as communication leaders, we are expected to provide real estimates for how long we need to document a project, or what we can produce out given a predetermined timeline.

Using a simple Planning Tool, you can improve the accountability of your team and accurately plan documentation projects to gain:

- More accurate project estimates. With time, you should be able to estimate when your team can deliver on a particular project and better allocate resources for each project.
- A clear and specific explanation when things take longer than they "should have". Provided that you update the Planning Tool for a project if any of the factors change, you'll know which factors changed the delivery time. As best practice, it's best to retain the original calculations so that you can compare your estimate against actual results during the course of the project.
- A great way to justify new resources, budget for contractors, or to just say "no". Conversations about money and resources are so much easier when you know exactly how long something will take and can factor that into the time/ resources available to you.
- The ability to make strategic decisions. Using the Planning Tool, you'll have the ability to compare different delivery channels (print versus online, for example) along with other factors such as templates, edit levels and so on. Where you have room to adjust the scope of the project, you can do so based on reasonably accurate metrics.

Another more subtle benefit to be gained in taking this approach to documentation planning may be in strengthening the reputation of your department. If your department is seen to be reliable and deliver on its promises, you retain the faith (and the support) of your stakeholders.

The Science of Doc Metrics – Estimating How Long It Takes

Every team is different, and how long it takes to write a document depends on a variety of – believe it or not – measurable factors. However, weighting those factors can be entirely relative.

The key to creating meaningful metrics is tailoring them to your team, its environment, and lessons learned from previous projects. There is no magic formula – you must create your own solution, then test and retest your “tool” until you have perfected the results. Your goal should be to have measurable and predictable planning metrics that are easy to use (and then use them!).

This article presents a Planning Tool that we’ve developed for our documentation projects. Ours is still a tool in progress, but we’re happy to share what we’ve got so far…

Start With a Purpose

Document metrics can help you to predict (with reasonable accuracy) how long a project should take, and/or determine how much you can get done within a specified timeline. Good planning metrics may also help you determine (and justify) when to bring in a contractor…or even when to say “no” to a project.

Build It

Step 1: Determine Important Factors

Unfortunately, there is no “one size fits all” set of factors or weighted values. So when we sat down to come up with a Planning Tool, we determined the factors that impact our projects.

Some background information is important here: our team is specialized in internal documentation and we primarily build small-to-medium sized instructional documents, as well as online documents for training/reference. We decided to build this tool in Microsoft Excel, where we could use basic macros to calculate the totals for us.

The factors we included in our Planning Tool include:

Factor	Description
Document size	Print: # of pages Online: # of topics
Production level	New: create content, edit, format New: content provided, edit, format Update: add some new content; edit, format Update: edit, format only
Complexity	Low, medium or high
Format	Microsoft Word, Microsoft Visio, HTML, Other
Template Requirements	New template Existing template Revise template with document No template

Graphics	None < 5 5-10 > 10
Delivery channel	Print/PDF Online (HTML, CBT) Word document Multiple formats
Review cycle	# reviewers/stakeholders Full reviews required (content/structure/proof) Content reviews only Proof only (spelling, grammar)

The first factor – Document size – is the number we use as the base value for the rest of the calculations. Within each category, a weighted value is set for the option selected. The total number in the tool is the "number of hours" required to complete the project:

Base Project

		Weight	Total
Size of Document:			
# of pages	40	0.3	12
# of topics (use for **online** only)	0	0.15	0.0
Subtotal:			**12.0**
Choose <u>one</u> item in each category:			
Type of Document			
New: create content, edit, format	☑	1	12.00
New: content provided, edit, format	☑	0.5	6.00
Update: add NEW content, edit & format	☑	0.75	9.00
Update: edit & format only	☑	0.25	3.00
Complexity of Content			
Low	☑	0.25	3.00
Medium	☑	0.5	6.00
High	☑	1	12.00

Note: *To show you the weights, we've selected all options in each category. When using the tool, we select one option only in each category.*

From there, it's pretty easy to convert that number to other useful time estimates such as "number of person days" or "number of person weeks".

For larger teams or teams with a wide range of experience, you may consider adding "experience level" as an additional factor (or even "familiarity with content" to account for a learning curve).

Step 2: Figure Out the Weights

The easiest way to figure out how to weight the factors you include in your Planning Tool is to set a "base weight" of 1 for the most common option in each category. Then, compare the other options and add or subtract weight based on your experience (we keep it at increments of ".25" to keep things simple).

You will use these "weights" to calculate the totals for each item, so be prepared to adjust them until you get reasonable time estimates for each project factor.

Step 3: Calculate Your Totals

The last step in creating your spreadsheet is calculating the totals from what you have entered into a meaningful, and reasonably accurate, estimate. You don't need to be a math whiz to play with these numbers—a common sense approach here works best. This exercise does not need to be complicated, so keep it as simple as possible.

Keep in mind the following as you create your formulae:

- Have all your totals related to only one factor: page and/or topic count; don't overcomplicate the formula by adding in other relationships or factors.
- If you have to "fudge" totals, or apply a "fudge" factor to attain more reasonable totals, something is wrong with your weights—adjust the weights, not the totals.

To test your spreadsheet, use the tool to calculate a time estimate for projects that you've already completed. Use projects where you have good information regarding the factors involved and know how long it actually took to complete the project.

Compare the "actual" results with the "predicted" results of your new Planning Tool. The more projects you are able to plug into the tool, the more accurate the tool becomes.

Step 4: Use It and Test It Again

Okay, here's the crucial part: everyone must use the tool, for every project AND everyone must track projects as they work on them, based on the factors in your tool. Sounds simple enough, right?

How Do I Know When I've "Got It"?

Your Planning Tool is good once there is a reasonable level of accuracy in its ability to predict how long a project will take. However, make sure that you update the tool to account for new delivery channels, new types of documents or any other changes that may impact how accurate the tool is. Think of it as a "work in progress"—just as our work environment evolves, so must our Planning Tool.

What we've found as we continue to develop this tool is that it encapsulates our experience in a format that is reusable and extendible into the organization. These meaningful metrics are helping us to better serve our customers and better manage resources. Happy number crunching...

About Sherry McMenemy

Sherry McMenemy is a senior STC member with experience in technical communication, information management and, user interaction design. She uses card sorting at work, where she manages an IT Knowledge Operations team, and is a consultant to local companies.

About Margie Yundt

Margie is the Editor for The Quill, an active member of the STC council, and since graduating form the University of Waterloo in the early '90s, has been working as a technical communicator and documentation/project manager. When not "online", she enjoys hanging out with her two kids and in Guelph.

View from the Other Side: The Observational Tourist

by Nancy Halverson, Feature Writer

As the whirlwind that is my life settles a little, I'll take a little time to tell you about some of the things I've been noticing in my travels.

I've just returned from Canada—my family were so incredibly happy to share in my mother's joy at finding love at 69. She and her new husband make a great couple and it's wonderful to see a permanent smile on her face.

The ENORMITY of it all

We also spent a few days in Waterloo after the wedding (in Peterborough County)—so comfortable to be in the place we think of as 'home'. I was once again amazed at the spaciousness of everything from homes to roadways—even the parks seem so huge! And we finally figured out that the big yellow thing in the sky was actually the sun!

One thing that we were disturbed by however was the shear number of huge cars that are on the road – who needs all these militarized vehicles like the Hummers and the enormous SUV's? How much gas do they take to move along the road? Coming from the narrow roads and tiny parking spaces in Europe and especially in England, it's really a shock to see these tanks and 'battlestars' moving around in so much space. It's probably a perception thing...

(I have actually seen a Hummer on the street here in England though – it dwarfed everything but the double-decker buses and must take up three British parking spaces! And there are more and more Chrysler Voyagers and Jeeps being added to the Range Rovers etc, so even when gas prices are two and a half times what they are in Waterloo, some people are still convinced that they need the battlestars. I think it's an oil company plot.)

I understand, no really

Other than the blue skies and lovely fall weather we had while we were 'home', it was a real pleasure to understand almost everything everyone said. I guess we're tuned to certain accents, but even people who speak to me in any other accents (German, Vietnamese, French Canadian) in Canada I can grasp their meaning without asking for a repetition. Maybe I resist the English (or Yorkshire) accents, but I still have difficulty. I'll admit that if someone says something to me here and I don't understand it, I simply nod and smile—which I didn't need to do once while I was in Canada! I never knew how much of a relief that would be... and I think it's that type of thing that makes 'home' so comfortable—wherever 'home' may be for anyone.

On being "tourists"

As our kids were fairly young when we moved to England (7 and 5) they never remembered going to Niagara Falls. The Falls are one of the quintessential Canadian experiences for most people from this side of the pond. So, we took a day to schlep the girls to see Niagara – and it was fabulous. We went on the Maid of the Mist (which I've never done!) and we did the tunnels under the falls. Both experiences are very wet, but not too much different from a rainy day here in Sheffield—except that the mist tended to blow from the direction of the falls, rather than swirl around like the rain vortex that usually happens here!

It's incredible how much we all enjoyed our day as tourists—I'm usually a tourist snob—I don't go in for the 'been there, done that' stuff, nor do Ryan or I like the commercial side of tourism. We spend the money on getting as close to the 'real thing' as possible, and leave all the periphery to others. So going on the Maid of the Mist was a natural, although we'd never taken the time before. The girls loved it all—the grandeur, and immense power of the water going over the cliff lived up to their expectations. I marveled at how few times we've actually been there—I felt like saying 'we have to go more often'. It's really an incredible site that anyone who grows up in that part of the world becomes entirely too immune to—the same as the Romans get bored with the archeological digs and ancient monuments.

Going round and round...

I am impressed that some roundabouts have been added to the road system in Waterloo—they're not as scary as you think they are! Actually, most roundabouts keep traffic moving very well—you just have to make sure that you look to your left before going into one. It's a difficult thing to communicate to new 'users' though—the signs were quite funny. You need to keep in mind though that you can be in a roundabout at the same time as other cars, since all of them are moving in the same direction. Some friends here at ZOOtech have shown me the scariest roundabout ever—it's a good reason for me to avoid Swindon I figure—maybe it's a population control thing, it seems so patently dangerous! But, if more simple roundabouts were used in North America, traffic would probably move smoothly. I got very tired of sitting in a lineup to get through intersections—I never thought it would be so boring!

Oh yeah, the STC

The year for our STC group here has begun—we're trying to put together four one-day events this year. It's a very interesting (read busy) year shaping up for me. I'm not sure that I'll survive really, but we'll give it a shot.

Our first one-day event is set for Nov 19 in Coventry. We're bringing over an American XML and DITA guru—Alan Houser. Since I'm the VP, and charged with co-ordinating the event, I'm pretty much on the hot seat to get this conference booked and profitable. Next, I've got something to put together for Sheffield for the spring. If you've got any advice for me—all you successful program managers, I'd really appreciate it!

About Nancy Halverson

Nancy grew up in Toronto, but has lived in Ottawa, Melbourne, Waterloo, and now Sheffield. She has travelled through the South Pacific, Australia and Indonesia, which is where she met her husband, Ryan Wilson (another Canadian), along the way.

A career switch introduced her to the STC in 1997. Her writing experience has included several contract positions and a position at Inscriber for several years. She has two daughters and has been living in England for over two years.

Membership News

by Leanne Rollins, Membership Manager

I was thrilled to meet several new chapter members at last month's meeting. Although I have been issuing personal invitations to each new member encouraging them to come out to a general meeting, I know that putting yourself 'out there' in a new situation with new people can be very intimidating. I think this is the very reason that the council agreed I should be membership manager this year—I'm the least physically imposing person you could hope to meet (well, other than Opal anyway).

New members represent new ideas and talent within our chapter. We're also at a point now in our chapter history where we have an amazing blend of veteran members and new members. Recent statistics sent out by our chapter president, Debbie Kerr, show that of our 152 members, 32 people have been members of the STC for at least 10 years.

With a 21% veteran membership, there is a great deal of talent to draw on, and we often ask these veterans to speak at monthly meetings. But just because you are a new(er) member does not mean you are new to the field.

I want to hear from those within our membership who joined the STC within the past two years, but have been in the industry for five or more years. Email me a brief biography, and let me know why you eventually decided to join the STC. I'll include selected biographies in this membership article over the next few months.

This month we welcome **Richard Gagnon** to our chapter. We also congratulate our members, **Debbie Davy** and **Chet Skibinski**, on becoming senior members of the STC. This change in membership status occurs when someone has been a member of the STC for five years.

Again, new members, please come check out a meeting, and make sure you find me and say hello! Veteran members, you are still encouraged to find me and let me know what's new. ♦

About Leanne Rollins

Leanne recently became a self-employed contractor, escaping management roles for the first time in years. This newfound freedom has allowed Leanne to take on extra-curricular activities such as a more active role in the STC. When not writing or playing with her kids, Leanne enjoys running and soccer.

General Meeting Announcements

November 1 DITA as an Authoring Format for Technical Information

So what the heck is DITA? Darwin Information Typing Architecture (DITA) provides maps for assembling topics into deliverables. By specializing the map elements, you can define a formal information architecture for your deliverables.

This architecture provides guidance to authors on how to organize topics and lets processes recognize your organizing principles, resulting in a consistent, clear experience for your users.

Join us @ the University of Waterloo Davis Centre, Room DC 1304 7:00 PM (doors open at 6:30 PM)

Michael Priestley is one of the XML architects of the Darwin Information Typing Architecture (DITA), with specific focus on its specialization and map architectures. He is also an information architect and tools specialist for Rational software in IBM. He has written numerous papers on information design, architecture, single-sourcing, and information development processes.

December 6th Document Development with Structured FrameMaker and XML on a Small Budget

Would you like to break into the world of XML, but you don’t have much time or money? Come to the December general meeting to learn about tools to help you:

- Get information from SMEs in electronic format and seamlessly import it into your desktop publishing tool
- Manage reviewers in remote locations
- Produce both HTML and PDF from a single source
- Develop documentation for the popular Eclipse development environment.

Let Fei Min introduce you to some neat tools that will help you achieve your goals more efficiently. If your documentation department is looking for a low-cost entry point to using XML that has a minimal impact on your production schedule, she'd got a practical solution.

Join us @ the University of Waterloo Davis Centre, Room DC 1304 7:00 PM (doors open at 6:30 PM)

Fei Min Lorente has been a technical writer for over 15 years and has worked with different tools from General Markup Language (GML) on a mainframe to Word on a MacIntosh. She has often had to take a leadership role in developing new processes and researching new tools for producing documentation. She has worked in the database, defence, oil and gas, banking and semiconductor industries. She is currently the lone writer at AMI Semiconductor Canada Company, the Volunteer Coordinator for the Southwestern Ontario chapter, and one of the editors for the CIC SIG. She considers herself a programming dilettante.

In this issue:

Need a Résumé Makeover?

Are you having trouble finding work in technical writing, and want free résumé and job search advice? A STC Toronto member, Pamela Paterson, provides proven advice for the tough job market. For résumé advice and to set up a session, visit:

http://www.writertypes.com/resources.htm

To use this free service, you must be a member of the STC Toronto or Southwestern Ontario chapters.

In this issue: