

THE MAKING OF A SUCCESSFUL SEMINAR:
PACIFIC NORTHWEST LABORATORY'S "QUEST FOR
QUALITY"

DISCLAIMER

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**The Making of a Successful Seminar:
Pacific Northwest Laboratory's "Quest for Quality"**

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Abstract

Five contractors located on or near the Hanford Site in southeastern Washington State support technical communications staffs, all trying to meet the needs of one primary customer: the U.S. Department of Energy. Historically, these staffs have maintained different processes and standards with regard to document production, and little interaction or information-sharing has occurred. To begin remedying that situation, the communications staff of Pacific Northwest Laboratory, a multiprogram national laboratory located in Richland, Wash., planned and hosted a one-day "Quest for Quality" seminar. The seminar was the first of its kind to comprise technical communications professionals from all the local DOE prime contractors, including technical editors and writers, publications assistants, text processors, and document production staff. The goals of the seminar were to identify ways to improve the quality of Hanford's communication products and processes, to strengthen ties among technical communications staffs, and to open the lines of communication for future collaborative efforts. An eight-person committee selected topics, arranged facilities, recruited speakers, coordinated activities, hosted the seminar, and prepared proceedings.

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Introduction

The technical communications staffs of five contractors located on or near the Hanford Site (southeastern Washington State) all try to meet the needs of one primary customer: the U.S. Department of Energy (DOE). Historically, these staffs have maintained different processes and standards with regard to document production and have had little interaction or information-sharing.

Toward remedying the situation, the Applied Technologies Communication (ATC) section of the Technical Information and Communications Department (TI&CD) at Pacific Northwest Laboratory (PNL) hosted a "Quest for Quality" seminar in November 1993. Eighty-eight technical communicators attended the half-day seminar, which covered such topics as document design, site-wide production standards, and "reinventing government." The seminar was the first of its kind to comprise technical communication professionals from all Hanford Site contractors; attendees included technical editors and writers, publications assistants, text processors, and document production staff.

Our goals for the seminar were to identify ways to improve the quality of Hanford's communication products and processes, and to strengthen ties among technical communication staff at the site. We also hoped to open the lines of communication for future collaborative efforts. This paper will address the planning and organization of the seminar, and the lessons learned from the experience.

Forming the Committee

Seven ATC staff members volunteered to plan the seminar. Each committee member undertook activities in which he or she was interested or had a particular expertise:

- The project manager interfaced with department managers and other support staff, tracked progress toward the assigned activities, set up the committee meetings and agendas, maintained the seminar registration, and supported the other committee members when needed.
- The liaison interfaced with key contacts at other Hanford contractors and with the local professional society, and distributed initial surveys designed to glean ideas for possible session topics and presenters.
- The speaker advocate contacted the speakers and panel members to direct them in planning their presentations, made arrangements to organize needed materials, wrote inviting session descriptions for a seminar brochure, and ensured proper set-up of the meeting rooms on the day of the seminar.
- The desktop publishing expert created a professional image for the seminar by developing a logo to carry the seminar theme throughout all our printed materials: invitations, brochures, nametags, surveys, thank-you notes, and proceedings.

- The secretary had all the right contacts for ordering lunches, setting up conference rooms, and taking care of the all-important coffee and refreshments.
- Two documentation specialists were responsible for putting together the conference proceedings, which involved arranging in advance for notetakers and providing them instructions; gathering the lists of session attendees; editing and rewriting the meeting summaries into a cohesive style; and putting together a quality document that correctly summarized the seminar presentations and activities.

Getting Organized

The planning process began 6 months before the seminar. The committee first met in May for development and discussion, and resumed organizing actions in October. At our first meeting, we brainstormed and assigned the following tasks.

- Send a letter, signed by the TI&CD manager, to the managers of all potential attendees informing them of the upcoming seminar and its purpose.
- Distribute a survey, via electronic mail, to all potential attendees to help identify topics of interest. The responses would be compiled and presented to the committee for discussion.
- Identify and schedule conference rooms.
- Produce and send invitations to all potential attendees.
- Send a message to staff members in our own organization requesting they sign up to bring refreshments for the seminar. (A volunteer system was chosen to keep costs down and to add a more personal touch to the seminar.)
- Identify and organize presenters, notetakers, session facilitators, group leaders, etc.
- Write, edit, produce, and distribute a proceedings.

After tasks were determined and assigned, we assessed the time it would take to do each task, then developed a schedule. Each member prepared a cost estimate for his or her tasks. The project manager compiled the estimates and submitted them to the ATC section manager for review.

The next step in the planning process was to determine the structure and theme for the conference. Our time for the conference was restricted to 2.5 hours. We worked out a possible schedule for the seminar: A 30-minute introduction/gathering with two 45-minute sessions of two topics each, a 15-minute break between them, and a 15-minute wrap-up. After much discussion, we decided to increase the number of sessions to four in order to offer more choices to the participants.

The theme of the seminar took a little more discussion and a lot more thought. We decided that the seminar should focus on quality, and brainstormed the "Quest for Quality" title.

Before stopping work for the summer, we set a date for the seminar and scheduled the conference rooms. We chose a day of the week that the most people would likely be at work, and tried to avoid typical "busy seasons." Wednesday, November 17 was chosen, and then conference rooms were scheduled based on their size and proximity to each other.

Brainstorming the Details

In October, the beginning of the new fiscal year, the committee began meeting again. We re-estimated our time and costs for the seminar and an accounting code was set up to track the costs. This task helped us accurately track the associated costs, because management was interested in possibly putting together another seminar on a larger scale.

After the committee discussed ideas for topics (e.g., benchmarking, production management, compiling multiauthor documents, etc.), the liaison and speaker advocate drafted the topic survey, sent it out to all of the other committee members for approval/comments, finalized the survey, and mailed it to the potential attendees. When the surveys were returned, the liaison compiled the responses, and the committee analyzed for audience interest the topics that received the greatest number of positive responses: Would the topics chosen be of interest to text processors? Publications assistants? Editors? Was there at least one topic in each session that would interest each of these groups?

After we decided on our topics (see Table 1), the committee estimated the attendance for each session. From the interest indicated by the surveys, we suspected that Document Design and Document Production Standards would draw the biggest audience. Those topics were slated for both sessions. The remaining topics were presented in one session.

Also based on the audience assessment, we decided which conference room would host which topic and during which session (i.e., the two topics that we assessed as probably having the most attendees were placed in the larger conference rooms; Project Collaboration and Standard Generalized Markup Language [SGML] were put in different sessions because their main audiences were the same).

Table 1. Session Topics

Session	Topics			
I	Dos and Don'ts of Document Design	Document Production Standards	Understanding the Up-and-Coming SGML	Realistic Project Planning and Tracking
II	Dos and Don'ts of Document Design	Document Production Standards	Making the Most of Project Collaboration	Reinventing Government: What Does it Mean for Us?

After the topics were chosen, the committee identified potential speakers, facilitators, and notetakers. The speaker advocate made contacts until suitable speakers were found for each session. We preferred to vary the presentation formats, and suggested to speakers such options as lecture, panel presentation, or storyboarding. The documentation specialists organized the facilitators and notetakers.

Invitations were prepared by the desktop publishing expert and approved by the committee. Invitations were sent to everyone who had indicated interest in the seminar, along with many others who were identified as possible attendees. The invitation included a registration form to detach and return to the project manager, which provided a way to track the number of participants. The attendees also were invited to order a box lunch or bring their own and stay after the sessions to continue the lines of dialogue.

The speaker advocate and desktop publishing expert prepared a brochure for the seminar that contained topic summaries (which were also sent out ahead of time via electronic mail), speaker/facilitator biographical sketches, session locations and times, etc. This brochure was given to the participants as they entered the seminar.

At the final meeting in November, name tags were approved for production, notetakers were finalized, and day-of-seminar tasks were assigned. The latter included setting up rooms, work the registration table, organizing the food as it was brought by section staff, getting the lunches from a local deli, and handling the dividers in the large conference room.

Running the Seminar Smoothly

We arrived at the seminar site at least 2 hours early to ensure that the many last-minute adjustments were made. The activities on the last day included the following:

- Move chairs, tables, and room dividers as necessary.
- Set up check-in table.
- Make certain microphones, overhead projectors, sound systems, etc. were in working order.
- Set up tables with coffee items.
- Arrange refreshments as they were delivered.
- Plug in coffee makers approximately 40 minutes before seminar begins.
- Ice down cans of fruit juices and soft drinks.
- Locate cloak rooms and places to hang umbrellas and store outerwear.
- Travel to grocery store, if necessary, for extra food items, ice, or beverages.
- Check in guests as they arrive; hand out preprinted nametags.
- Meet with the presenters a few minutes before the seminar to make sure they had everything they needed.
- Meet with facilitators and notetakers before seminar to make sure they had necessary supplies, instructions, and directions to conference room.
- At the beginning of the sessions, check with the facilitators or presenters to see if they needed extra copies of handouts, supplies, temperature controls in the room, etc.
- Pick up the lunches from the deli.

During the seminar, it was necessary for committee members to roam the sessions. We made copies and tracked down supplies, collated handouts for unprepared presenters, and took photos. Based on the conversations before the seminar and during the break, we anticipated that one of the session topics that didn't generate much interest in the survey actually was going to have the largest attendance. We quickly switched conference rooms to accommodate the larger group, which turned out to be a very wise decision.

After the seminar, many of the participants stayed for lunchtime conversations. We committee members stayed to clean up the conference rooms, then met to discuss our perceptions of how things went and to capture on paper all of the lessons learned.

In the week following the seminar, we sent thank-you notes to those individuals who helped make the seminar a success. We also submitted a nomination for an established award for those communications staff who helped make the seminar a success (presenters, panel members, facilitators, and notetakers). Proceedings were distributed to all who attended the seminar.

Gathering Feedback

As the participants were leaving the seminar, we asked them to fill out a survey to provide us their feedback and impressions. Except for a question asking respondents to rate the topics using a given scale, all survey questions were open-ended, and included the following:

- How could the session(s) have been more relevant or interesting (please specify session[s])?
- How did you feel about the time allotted for the sessions?
- Of the sessions you attended, were there any speakers/storyboarders/panel members who gave outstanding presentations, in either a positive or negative sense (please specify and explain)?
- Overall, did you feel the seminar enhanced your work experience? If so, how?

The following list summarizes the findings.

- Most attendees thought there had not been enough time allotted for each session--"we were just getting warmed up!"
- Only one session received negative comments regarding the quality of the speakers; however, those responses were mild, for example, "need more presentation experience...but I'm sure time and practice will change this."
- Most respondents thought the sessions would have been more relevant or interesting if more examples had been used in the presentations.
- Almost everyone who responded thought the seminar enhanced their work experience. They were also very excited about attending a similar seminar in the future. They wanted the same topics covered so they could attend the sessions that they had missed this time.
- Other suggestions included adding more discussion in each session and a wrap-up at the end.
- *Many* people commented via the surveys and verbally that the food was an excellent and impressive touch, reinforcing the theory that if you feed them, they will come.

Lessons Learned

The planning committee met immediately after the seminar to discuss and list the lessons learned throughout the process. Overall, the seminar was a very positive experience; however, we identified several ways the process and seminar could have been improved:

- Send out the interest survey as a hard copy to get a better response. We suspect many people didn't bother to read the electronic mail message and then deleted it.
- Make the registration as obvious as possible. The small registration form at the bottom of the invitation was overlooked by many.
- Don't rely on managers to provide information to their staffs. Get information out directly by obtaining organization charts from the other companies. Many of the editors at one company didn't seem to have received the information.
- Have attendees preregister for specific sessions for more accurate attendance. (Many of the folks tried to preregister anyway.)
- Ask the presenters to give dry-run presentation to the committee to improve the quality of the presentation, handouts, viewgraphs, etc.
- Set up the welcome table *early* to be ready for the earlybirds.
- Set up a room for the speakers to prepare their materials.
- Meet with the speakers a few minutes before the opening remarks so we can be sure they are there and ready.
- Provide a wrap-up or closure. (We tried unsuccessfully because it was hard getting everyone back into one room.)
- Provide a place for names on the feedback survey.
- Have all the meeting rooms closer together. (Avoid conference rooms on different floors.)
- Ask each session presenter to thank the attendees for coming and let them know about the wrap-up.
- Feed the attendees!

Overall, we were very pleased at the turnout for the seminar, and the responses we received to our follow-up survey were very positive. We'd like to see more of these types of gatherings in the future, perhaps even a conference for technical communicators from government laboratories nationwide.