
STC Judging Handbook

Boston and NNE Chapters

Technical Publications Competition 2009

This *STC Judging Handbook* provides information about the Technical Publications Competition, including key dates, locations, and contacts.

Pick up your judging package, including your assigned entries, at the mandatory judges' orientation session. Review the contents of your judging package. It should contain:

- This handbook
- Team assignment, listing the entries in your packet
- One copy of each entry listed on the packing slip
- One copy of the *Judging Worksheets* and one copy of the *Judges' Discussion Notes* form per entry

If an item is missing, contact the Technical Publications competition coordinator:

Elizabeth Coons at 617-277-1296 or ecoons6@comcast.net

We'll see you at consensus judging on Saturday, November 21, 2009, at The Mathworks, Natick, MA.

Thank you for participating!

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Events, Dates, and Locations

Judges' Orientation

Sign-up

August 1 to October 14

Types of Judges

Judges are categorized as follows:

- New
- Returning
- Lead

Judges' Orientation Schedule

Orientation is **mandatory** for all judges. It takes place on Thursday, October 22, 2009 from 6:00 p.m. to 9:00 p.m. at:

Airvana
19 Alpha Road
Chelmsford, MA 01824
866-344-7437

Directions to Airvana

http://www.airvana.com/about/about_600.htm

From Route 128/I-95:

- Take Rte 128/I-95 to Exit 32, Route 3N
- Follow Route 3N (South of I-495) directions (below) to Airvana

From Route 3 North (South of I-495):

- Take Rte 3N to Exit 29, Rte 129/Billerica Rd
- Turn right onto Rte 129
- Follow Rte 129 for 3/4 mile
- Turn left onto Alpha Rd
- Building is 500 yards to the right

From Route 3 South (North of I-495):

- Take Rte 3S to Exit 29, Rte 129/Billerica Rd
- Turn left onto Rte 129
- Follow Rte 129 for 3/4 mile
- Turn left onto Alpha Rd
- Building is 500 yards to the right

From I-495 South:

- Take I-495S to Exit 34
- Follow the ramp onto Rte 110/Chelmsford St
- Follow Rte 110 for 0.5 miles
- Turn left onto Wilson St
- At the end of Wilson St turn left onto Rte 129/Billerica Rd
- Follow Rte 129 1.1 miles to Alpha Rd
- Turn right onto Alpha Rd
- Building is 500 yards to the right

From I-495 North (South of Exit 33):

- Take I-495N to Exit 33
- At the end of the ramp turn right onto Rte 4/North Rd
- Follow Rte 4 for 0.4 miles
- Turn left onto Fletcher St
- At the end of Fletcher St turn right onto Rte 110/Chelmsford St
- Follow Rte 110 for 0.3 miles
- Turn left onto Wilson St
- At the end of Wilson St turn left onto Rte 129/Billerica Rd
- Follow Rte 129 1.1 miles to Alpha Rd
- Turn right onto Alpha Rd
- Building is 500 yards to the right

Consensus Judging

Consensus Judging takes place on Saturday, November 21, 2009 from 9:00 a.m. to 12:00 p.m. at:

The Mathworks
3 Apple Hill Drive
Natick, MA 01760-2098
508-647-7000

Directions to The Mathworks

<http://www.mathworks.com/company/aboutus/directions.html>

From the Massachusetts turnpike (Mass Pike/I-90 East or West):

The Massachusetts turnpike is a toll road.

- Take Exit 13 to Natick/Framingham-Route 30.
- Take the left ramp towards Natick (Route 30 East).
- Drive down the ramp and onto Route 30. Stay in the right lane.
- At the first traffic light, turn right onto Speen St. Move into the left lane and go through two sets of lights.
- Exit left, following signs to Route 9 East.
- Continue on Route 9 East for approximately a mile and a half.
- About a quarter of a mile beyond the Route 27 overpass, turn right into the main entrance of Apple Hill. (Apple Hill Dr)
- Proceed through one stop sign.
- The main entrance is in the building at left (3 Apple Hill Dr). Visitor parking spaces are to the right, in front of the parking garage entrance.

Best of Show**December 2009**

A specially appointed team of judges reviews all entries that achieved the Award of Distinction and selects one of them to receive the Ronald D. Eames Best of Show award. The award is publicly announced and presented to the winner at the STACIES Awards banquet.

**STACIES
Awards
Banquet****February 2010**

Celebrate your efforts and excellence in technical communication at the STC Technical Achievement in Communicating Information (STACIES) Awards Banquet.

**Technical
Publications
Competition
Contacts**

Technical Publications Competition contact information:

Competitions General Coordinator

Mark Decker
603-566-0331
mark.decker@rsa.com

Technical Publications Competition Coordinator

Elizabeth Coons
617-277-1296
ecoons6@comcast.net

Evaluation Process

The judging process comprises:

- Judges' orientation
- Individual evaluation of entries: Completion of the *Judging Worksheets* and the *Judges' Discussion Notes* form for each entry
- Consensus judging: The general judging process concludes at Consensus Judging, where you and the other judges on your team determine which entries win which awards (if any)
- Best of Show award
- STACIES Awards banquet

Individual Evaluations

The individual evaluation process begins when you receive your assigned entries at Judges' Orientation. You have about four weeks to review your entries and to complete the judging worksheets and your Judges' Discussion Notes forms.

If you have questions during the Individual Evaluation phase, contact either your lead judge or the Technical Publications Competition Coordinator.

Judging Forms

The following forms are used in the technical publications competition:

Name of Form	Description	Judge Type	When	Returned to Entrant?
Judging Worksheets	Evaluation worksheets containing judging criteria, organized by technical publication categories	All	Individual evaluation of entries	Yes
Judges' Discussion Notes	Summary of your individual evaluation for an entry; record of talking points to use at Consensus Judging	All	Individual evaluation of entries	No
Consensus Report*	Explanation of how the judging team arrived at its award decision	Lead	Consensus judging	Yes
Team Summary	Assignment of award level for each entry in the competitions database	Lead	Consensus judging	No

*** IMPORTANT:** The lead judge is responsible for completing a Consensus Report for each entry. If judges arrive at consensus with very different individual evaluations of the same entry, the consensus report provides the only rationale for the award level they assigned. For example, if two judges assign an entry all 4s and 5s, while the third judge assigns the entry 1s and 2s, and the result from consensus is no award, the entrant deserves an explanation of how the two judges changed their assessment during the team discussion. Therefore, the Consensus Report, which is delivered to the entrant, must clearly state the criteria for how the final award decision was reached.

Individual Evaluation of Entries

Use the following rules and recommendations to help you as you work individually on the evaluation of competition entries.

Overview

Judge each assigned Competitions entry according to the established Evaluation Categories and Key Criteria. Record your individual evaluation on the Judging Worksheets, writing as many comments as you can and assigning a rating for each evaluation category. Then, summarize entry strengths and weaknesses and record an overall rating for each evaluation category on the Judges' Discussion Notes form.

Note: *Before* Consensus Judging, Saturday, November 21, at 9:00 a.m., you must complete all of the Judging Worksheets and a Discussion Notes form for each entry assigned to you.

Most entrants expect to receive not only an award, but also a thorough critique of their work from fellow technical communicators. After Consensus Judging, the Judging Worksheets are returned to the contact person for the entry.

The Judging Worksheets and the Judges' Discussion Notes form are distributed at Judges' Orientation. They are also available at the Judges link in the Competitions area of the Boston chapter website:

<http://www.stcboston.org/competitions/>

Rules for Judging

Observe the following rules and guidelines:

- Read the entry cover sheet. The cover sheet contains valuable information about the intended audience and purpose of the entry. It may include notes for the judges to consider in their evaluation of the entry.
- Do not write anywhere on the entries. The entry is not returned to the entrant. If an entry wins an Award of Distinction or Excellence, your copy of the entry may move on to the International Technical Publications Competitions (ITPC).
- If an entry appears to be misclassified, notify the Technical Publications Competition Coordinator, who can reassign it correctly.
- To ensure consistency in the judging process, evaluate each entry according to the guidelines provided in the Using the Summary Ratings and Award Levels table.
- Judge each entry on its *own* merits, not in comparison to other entries in a judging package.
- Be objective, impartial, and helpful. Remember that a person with feelings and intelligence wrote the entry and will read your comments. Comments that are sarcastic or uninformative harm the Competitions and do not help the entrant.

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- Be thorough and constructive. The more comments you write, the easier it will be for your team to agree on the evaluation of an entry. The more constructive your critique, the easier it will be for the writer to acknowledge and incorporate your suggestions.
 - Strive for balance. If an entry has no major flaws, it deserves at least an Award of Merit. For example, a couple of typos in a 200-page manual are minor, not major, flaws. See About Flaws for details.
 - Avoid judging the work of someone you know. Whereas the entrant name does not appear on the entry, you may recognize an entry as the work of a colleague you know. If this occurs, notify the Technical Publications Competition Coordinator immediately.
 - *Before* you arrive at Consensus Judging, you *must* complete the Judging Worksheets and a Judges' Discussion Notes form for each entry assigned to you. Your comments are very important to the judging process. Filling out the Judging Worksheets on the day of Consensus Judging does not allow you to participate fully in that process and denies the competition entrants the thoughtful evaluations they deserve.
 - At Consensus Judging, you will use the comments that you wrote on the Judging Worksheets and Judges' Discussion Notes forms to explain your overall rating of an entry, and to support your position if your team disagrees about the ratings.
 - Keep all information confidential. For questions about confidentiality, call either the Competitions General Coordinator or the Technical Publications Competition Coordinator.

Completing Judging Forms

The objective of the Individual Evaluation of Entries is for each judge to *individually* complete a thoughtful, constructive, and fair assessment of every entry. To do so, you probably need to review an entry more than one time.

Example

The information that follows is one suggested way to proceed. It breaks up the individual evaluation into two passes. You may prefer to perform three or four passes. Many judges do.

Pass 1

In Pass 1:

- Review the comments about the purpose and the audience that the author provided on the entry cover sheet.
- Skim the entry to get a general idea of what it is trying to accomplish.
- Scan the entry. Page through the front matter, body, and end matter. Use the chapter titles, section titles, and headings as clues to whether or not the organization of an entry meets its stated purpose.
- Take notes on a separate sheet of paper or use post-its to help you organize your thoughts. *Do not write anywhere on the entries.* The entrant will not see the entry again.
- Focus on whether an entry meets audience needs rather than your own. You may have ideas about what constitutes a technical document, but you are not representative of the audience for the entry.
- For questions about the technical nature of an entry, contact the Technical Publications Competition Coordinator.
- Do not let your company standards for design and format influence your evaluation. Companies set standards for their own purposes; therefore, standards among companies vary.
- Do not let color, expensive paper, or fancy typography influence your evaluation. A quality publication can be produced on a limited budget, just as a poor publication can be produced on a large budget.

Pass 2

In Pass 2:

- After you have a general impression of an entry, use the Judging Worksheets to determine how well the entry meets each evaluation category: audience and purpose, organization, content, writing and editing, illustrations and graphics, layout and design, production and integration. For more information, see Evaluation Categories and Key Criteria.
- Refer to Using the Summary Ratings and Award Levels Table for guidelines by award level for each category.
- To facilitate the Consensus Judging process and to provide valuable feedback to the entrants, type detailed comments on the Judging Worksheets. The Worksheets are Microsoft Word documents. You can download them from the STC Boston Chapter Competitions web page: <http://www.stcboston.org/competitions>.
- Do not feel constrained by the size of the criteria comments boxes. You can add pages if you have more to say.
- Phrase your comments constructively. For example, a comment such as “consider reorganizing the chapters to keep all of the reference material together” is more useful and appropriate than “the organization is terrible.”
- Remember that the people who entered the Competition want to learn from your comments, not be insulted by them.
- Think of the evaluation process as peer editing. Provide as much feedback and specific detail as you would provide a friend who asks for your help to improve a document.
- You will use the information on the Judges’ Discussion Notes for each entry as talking points with your team during Consensus Judging. For more information, see Introduction to Consensus Judging.
- On the Judges’ Discussion Notes, record an overall rating and summarize the strengths and weaknesses of the entry for each evaluation category. Refer to Judging Tips for suggestions about determining the overall rating for an entry. Refer to Evaluation Categories and Key Criteria and About Flaws for helpful information.
- As needed, use the back of the Discussion Notes form or additional paper to record your strengths/weaknesses summary.

Note: The Judges’ Discussion Notes are *not* returned to the entrants.

Judging Tips

Useful tips:

- Do not let the size of an entry overwhelm you. It is not necessary to read every word of the entry. You can selectively read parts of the entry in depth to get a better idea of the editing and writing.
- The numeric ratings on the worksheets are guidelines to help you make decisions about award levels.
- It is not necessary to add (or average) numbers to arrive at an award decision, but you must measure an entry consistently. For example, if you assign a rating of 4 to all of the evaluation categories for an entry, your overall rating for the entry cannot be 1 or 2.
- You can assign a fractional (.5) rating. For example, if you think that an entry deserves a rating higher than 3 but less than 4, you may assign it a 3.5.

Evaluation Categories and Key Criteria

The evaluation categories that appear on the Judging Worksheets are briefly described here. The categories and suggested criteria for them appear on the Summary Ratings and Award Levels table.

Audience and Purpose

Audience and purpose are stated or implied. The author clearly researched the audience and designed the entry to meet audience needs. The entry is usable and appropriate for its audience and purpose.

If the entry is a member of a publications doc set, its position in the set and its relationship to the other members of the set is clear.

Organization

The organization of the entry is logical, coherent, and clear. Headings are used correctly and effectively. Each part, section, and chapter is appropriately sized and well developed. If overviews are used, they are helpful, not superfluous.

The table of contents and the index are useful and comprehensive. The index is cross-referenced, consistent, and easy to use.

References and footnotes are portrayed correctly.

Content

The content focuses on the tasks that the audience must perform. The text provides sufficient information and examples to explain concepts and procedures. The text stresses main points and avoids digressions.

If a glossary is needed, it is present and contains a comprehensive list of clearly defined terms.

Writing and Editing	<p>The text is easy to read and understand. It uses some variety of sentence structure and some originality of expression. It avoids wordiness and unnecessary repetition. The author carefully chose words to ensure that the text is informative and unambiguous. Rhetorical devices are used effectively to attain unity, coherence, and emphasis.</p> <p>Copy reflects correct grammar, syntax, spelling, punctuation, capitalization, and numbering. Terminology and style are consistent throughout the document.</p>
Illustrations and Graphics	<p>Illustrations, images, charts, screenshots, and graphs are legible, well-designed, and neatly executed. They are well-integrated with the text and support the content.</p> <p>The artwork uses the appropriate style and level of detail for the purpose and audience.</p>
Layout and Design	<p>The overall design, including the cover, is appropriate for the audience and purpose. The layout is neat and attractive. Typefaces, styles, and sizes are readable and work together.</p>
Production and Integration	<p>The overall effect of the publication is that of a highly professional accomplishment, with evidence of creativity or originality of approach.</p> <p>The communication is appealing, interesting, and useful to its intended audience.</p> <p>The entire presentation provides a balanced, unified, and well-focused impression without noticeable weak points.</p> <p>Printing, binding, paper, and ink contribute to the publication design and purpose.</p>

About Flaws

It is important to differentiate among major flaws, minor flaws, and non-flaws.

Major Flaws

A major flaw impedes the user to the point of preventing the location of information or the completion of a task.

The following flaws are considered major:

- Purpose and audience are unclear, creating confusion
- Organization is illogical to the point that a user cannot locate information or complete a task
- Insufficient headings
- Content consistently fails to match the audience definition
- Very poor writing throughout
- Procedural steps are consistently buried in the text rather than set off in numbered lists
- Consistent or numerous errors in spelling and grammar
- Pervasive inconsistent and confusing use of terminology
- Illustrations are too complex, sloppy, inconsistent, or out of context
- Inconsistent layout and design throughout
- Glossary needed but omitted
- Index needed but omitted

Note: One major flaw does not automatically disqualify an entry from receiving an award.

Minor Flaws

A minor flaw may cause a momentary stumble, but it does not *significantly* hinder the user.

The following flaws are considered minor:

- Inconsistent use of the second person
- A few spelling errors, grammatical errors, or typos
- A few incorrect cross-references
- A few illustrations lacking adequate explanation or labeling
- A few pages with too little white space (too much information crammed onto one page)
- A few instances of inconsistent or confusing terminology
- Occasional use of non-inclusive language, graphics, or design (such as he or she)

Non-Flaws

A non-flaw does not prevent a user from completing a task.

The following are examples of non-flaws:

- Corporate colors, typeface, and style are legible, readable and consistently used, but they do not match your corporate style or personal preference.
- Content is too complex for you to fully understand. However, you are not representative of the entry's audience, and the entry follows its own internal logic.
- Tables and figures are unnumbered. However, the publication introduces tables and figures appropriately and provides other means for locating them.
- No glossary. However, the audience is described as expert for the topic, and the publication uses no company jargon.

Consensus Judging

During Consensus Judging, each entry is assigned an award (or no award) based on the consensus of a judging team.

Judging Rounds

Typically, one round of Consensus Judging occurs for each entry. Occasionally, consensus is not reached during one judging round and a second round is needed.

Round 1

In Round 1, the three judges who evaluated the same entries attempt to reach consensus about which award (if any) to assign each entry. A team's consensus evaluation and award decision for an entry is based on the comments that the team members wrote, individually, on the Judging Worksheets and Judges' Discussion Notes during the Individual Evaluation of Entries phase.

If a judging team is undecided about which award (if any) to assign an entry during Round 1, the team may confer with members of the Technical Publications Competition committee.

Round 2

Round 2 is reserved for the occasional entry about which team members disagree. Any judge on the team may request a second round of judging. During Round 2, a team member presents the entry and the judging team's issues with it to a team of senior judges. The senior judges help the judging team assign an award (if any) to the entry.

Lead Judge

Each team includes a lead judge who helps to focus the evaluation process and keeps it moving at an appropriate pace.

The lead judge is the team member tasked with completing the Team Summary Report and the Entry Consensus Report. For information about these reports, see Judging Forms.

Award Levels

Competition entries are eligible for the following awards:

- Award of Distinction. The highest award.
- Award of Excellence
- Award of Merit
- Best of Show. Selected by special judging team in December.

Note: An entry with no major flaw and without many minor flaws deserves at least an Award of Merit. For more information, see About Flaws and Using the Summary Ratings and Award Levels Table. Only entries achieving the Award of Distinction or Excellence are eligible to move on to compete in the ITPC.

Using the Summary Ratings and Award Levels Table

The Summary Ratings and Award Levels table is a guideline for evaluating competition entries and making award decisions. The table includes all Technical Publications categories that appear on the Judging Worksheets. It lists each award level and suggests criteria to use to assign an award level.

Summary Ratings and Award Levels				
Judging Worksheets Category	Distinction	Excellence	Merit	No Award
	<ul style="list-style-type: none"> • Exceptional work in most categories • No major flaws • Mostly 4s and 5s 	<ul style="list-style-type: none"> • Some categories very good, others excellent • No more than one major flaw • Mostly 4s and at least one 5 	<ul style="list-style-type: none"> • Very good; above average • Mostly 3s and 4s 	<ul style="list-style-type: none"> • Major flaws or many minor ones; no exceptional features • Simply average • 1s and 2s; or all 3s
Audience and Purpose	<ul style="list-style-type: none"> • Clearly stated or implied • Well-researched • Meets purpose and audience needs • If member of documentation set, position in set is clear 		<ul style="list-style-type: none"> • Well-stated • Generally serves its audience and purpose 	<ul style="list-style-type: none"> • Audience and purpose are neither stated, nor implied • Not suited to audience or purpose
Organization	<ul style="list-style-type: none"> • Headings and topics progress logically; if work is multipart or multivolume, such organization is necessary • Information is delivered in digestible pieces • If used, overviews and summaries are appropriate and thorough • Font selections (type styles and sizes) for text and headings reflect and reinforce organizational structure • Table of contents is useful; if publication is a member of a set, the table of contents demonstrates the relationship • Index is comprehensive, cross-referenced, and useful 		<ul style="list-style-type: none"> • With one or two exceptions, clear and logical • Well-balanced, except a few topics are overly long or some topics could be combined with others • Overviews are good, but some are incomplete • Index could be improved; more task-oriented entries, more nonjargon 	<ul style="list-style-type: none"> • Basic organization could easily be improved • Organization is confusing • Too many/too few headings • Overviews needed but not present; or overviews present but inadequate • Index needed but not present; or index present but inadequate

Summary Ratings and Award Levels (continued)

	Distinction	Excellence	Merit	No Award
Content	<ul style="list-style-type: none"> • Focuses on the tasks the audience needs to perform • Appropriate level of detail • Sufficient examples to explain concepts and nuances of use; examples are well-integrated with text • If used, tutorial, glossary, and reference section are appropriate • If present, notes, cautions, and warnings are used thoughtfully and sparingly, and they are prominently displayed 		<ul style="list-style-type: none"> • Occasional inappropriate amount of detail (either too much or too little) • Examples missing where needed • Tutorial, glossary, or reference section needed, but not included 	<ul style="list-style-type: none"> • Not user-oriented • Inappropriate level of detail for audience or purpose (either too much or too little) • Inadequate examples
Writing and Editing	<ul style="list-style-type: none"> • Interesting, easy to understand, well-chosen words • No unnecessary repetition; not wordy • Rhetorical devices used to attain unity, coherence, and emphasis • Grammar, syntax, spelling, punctuation, capitalization, and numbering are correct • Style, tone, and terminology are consistent and appropriate for intended audience and purpose • References and footnotes are correct and consistent 		<ul style="list-style-type: none"> • Clear and factual • Audience is addressed inconsistently, but only infrequently • One or two terms need an introduction, but there is none • Occasionally, relationships among paragraphs or topics is unclear; some instances of overly complex writing 	<ul style="list-style-type: none"> • Writing is average and needs a copy edit • Ideas are unclear • Use of jargon inappropriate to audience • Inappropriate tone for audience or purpose • Complex or wordy sentences; pervasive use of inconsistent or confusing terminology

Summary Ratings and Award Levels (continued)

	Distinction	Excellence	Merit	No Award
Illustrations and Graphics (including figures, charts, tables, and screenshots)	<ul style="list-style-type: none"> • Well-designed and neatly executed • Well integrated with text • Support content • Appropriate amount of detail for audience and purpose • Neat, consistent presentation • Captions and callouts are appropriate 		<ul style="list-style-type: none"> • Some illustrations are inadequately explained in the text • Missing or incomplete callouts or captions • Inappropriate typeface used with illustration (such as for callouts) • Illustrations have inconsistent appearance 	<ul style="list-style-type: none"> • Illustrations are mediocre, need polish • Insufficient illustration • Illustrations are missing, presented out of context, inconsistent, sloppy, or too complex
Layout and Design	<ul style="list-style-type: none"> • Overall design, including cover, is appropriate for purpose • Neat, attractive layout; good use of white space • Typeface, styles, and sizes are very readable and add to coherence of design • Headings and information are delivered in a clear, clean, and consistent manner 		<ul style="list-style-type: none"> • Minor inconsistencies in use of fonts and symbols • Occasional illogical or inconsistent use of heading styles • Appearance of front or back matter is inconsistent with rest of layout and design • Occasional misuse of white space (too much or too little) 	<ul style="list-style-type: none"> • Varies from chapter to chapter • Fonts and styles detract from layout and design
Production and Integration	<ul style="list-style-type: none"> • Professional, creative, and original • Appealing, interesting, and useful to its audience • Consistent, unified, and well-focused presentation • Printing, binding, paper, ink, and tabs (if present) contribute to design and purpose 	<ul style="list-style-type: none"> • Professional and fairly creative • Interesting and useful to its audience • Consistent, unified, and well-focused presentation • Printing, binding, paper, ink, and tabs (if present) contribute to design and purpose 	<ul style="list-style-type: none"> • Professional • Useful to its audience • Well-focused presentation • Printing, binding, paper, ink, and tabs (if present) contribute to design and purpose 	<ul style="list-style-type: none"> • Amateurish • Of marginal use to its audience • Inconvenient • Unfocused presentation • Printing, binding, paper, ink, and tabs (if present) detract from design and purpose