Development and Implementation of a Technical Communication Body of Knowledge (TCBOK)

Project Charter

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Revision History

Table 0-1 provides the revision history of the ***Development and Implementation of a Technical Communication Body of Knowledge (TCBOK) Project Charter***.

Table 0-1. Revision History of TCBOK Project Charter

Version	Date	Reviewers	Description
1.0	07 August 2009	Team	STC Board Review Version
1.1	21 August 2009	Board	Initial Board comments
1.2	27 August, 2009	All	Incorporation of Board comments and post-board meeting comments
1.3	31 August 2009	Board	As approved by board
1.4	31 August 2009	Team	Removed 'Confidential' notice; published to STC TC BOK wiki

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1. Business Needs

1.1 Business Problem/Opportunity

For more than 50 years, the Society for Technical Communication (STC) has been a primary source and the definitive resource of technical communication knowledge and promoter of the umbrella of professions known collectively as technical communication. While there are other professional organisations that also embrace this tenet, the STC has been and remains the dominant player.

With the globalisation of information through the Internet, the time has come for development and implementation of a single point of entry primary source that develops, concatenates, and delivers all that is technical communication – in short, a Technical Communication Body Of Knowledge (TCBOK).

Developing and delivering access to this TCBOK will help the Society for Technical Communication to be seen as the authority on the field of Technical Communication:

1. To ensure that we are perceived as the prestigious organization in our field
2. To provide member value, both directly as a resource for our members and indirectly as a resource for the general public that demonstrates our leadership of the field.
3. To create a revenue stream from the valuable intellectual property that exists within STC publications.

1.2 Summary Project Recommendation

The TCBOK Task Force recommends STC Board provides approval and corresponding funding for a TCBOK Project to design, develop, and deliver a Technical Communication Body Of Knowledge that meets the following business objectives:

- To promote the visibility and raise the status of technical communication and of STC as the field's preeminent membership organization
- To provide STC members with a stronger sense of professional identity and a clearer sense of the career paths open to them
- To provide STC members with a wealth of resources and opportunities for continuous learning and professional development
- To create a vehicle for collaborative sense making and social networking that will foster a stronger sense of community purpose and spark wider participation
- To make available and capitalize on the wealth of intellectual property within STC publications, existing and yet to come

2. Project Scope

2.1 Project Mission Statement

The Project Mission Statement of the TCBOK Project Team is as follows:

> *By May 2010, the TCBOK Project Team will oversee and participate in the design, development, and delivery of Version 1.0 of the TCBOK.*

2.2 Project Scope

This section describes the project scope for the TCBOK project in terms of what is in scope for this project and in terms of what is not in scope for this project.

In Scope

The activities that are in scope for the TCBOK include the following:

- Develop and deliver all content that has been identified for inclusion in V1.0 of the TCBOK.
- Develop and deliver all project support documentation that is needed to communicate activities and efforts associated with the TCBOK Project. This includes the TCBOK Project Charter.
- Create a prototype portal.
- Review all papers in the *Journal of Technical Communication* published since 2000 to determine whether they are suitable for linking from the Portal.
- Provide a peer-reviewed call for suggestions for linking to papers published in the *Journal of Technical Communication* before 2000 and for linking to articles in the *Intercom*.
- Provide a peer-reviewed call for suggestions for linking to papers, articles, and chapters published outside the STC arena.
- Select a technology for the eventual Portal platform.
- Migrate content from the interim platform to the eventual Portal platform.
- Create a network of peer-reviewed expert guides to fill in the gaps.
- Provide for usability, accessibility, and international testing of the prototype Portal.
- Provide for transfer of Portal materials to the eventual platform.
- Establish a review board and review process for all Portal content.
- Make sure that TCBOK content is holistic such that it does not focus strictly on the IT industry, in terms of language, case studies, and so forth.

- All TCBOK content shall be developed as copyrighted, proprietary content belong to the Society for Technical Communication.
- Initially, content licensing will be held at the strictest type; relaxation of licensing and copyright material will occur as the content is identified as the appropriate type. At that point, the proposed licensing and copyright controls for the applicable types will be applied to the corresponding content. (Note: the three types of content are identified below).

Out of Scope

The activities that are out of scope for the TCBOK include the following:

- The TCBOK is not being developed directly as a tool for an STC Certification Program. This does not preclude selected content being made available for a certification program at a later date. ***It simply clarifies that the TCBOK is not being developed per se to support a certification program.***
- Anyone may suggest content to be added, deleted, or changed within the TCBOK. However, the TCBOK Project Team is not obligated to fulfill any suggestions. In other words, this is not an open-source resource or Wikipedia type entity.

2.3 Project Context Diagram

When the TCBOK project matures to the point of implementation to its eventual system home, a context diagram will need to be designed and documented for the TCBOK that is in terms of where the TCBOK fits overall into the STC information scenario. The completed context diagram and supporting documentation will answer the following questions:

- On what server/backup server would our TCBOK reside?
- Would there be any hardware upgrade requirements?
- On what platform would it run?
- What type of application should it be?
- Excluding the licensing costs for the software we select, what would the fixed and variable costs be for integration of the application into the platform?
- What type of testing will be required in terms of integration, regression, stress, and other testing (excluding usability and requirements compliance)?

2.4 Project Objectives

Project objectives of the TCBOK project include the following:

- Develop and deliver completely original content for Type 1 content.
- Develop and deliver a mix of original content and licensed content for Type 2 content.
- Develop and deliver a mix of original and licensed content for Type 3 content.

- Work through the STC Office and Counsel to negotiate and to price any content that is to be accessed by pay (or via membership-only benefits.)
- Work through the STC Office to provide for all hardware, software, and networking components that will be required to support the design, development, and implementation of the TCBOK Project deliverables.

2.5 Project Stakeholders

Table 2-1 lists the TCBOK project stakeholders:

Table 2-1. TCBOK Project Stakeholders

Contact Name	Organization	Role	Influences
STC Board of Directors	STC	Internal Management	Accountable
STC Office – Susan Burton	STC	Internal Implementation Management	Accountable
STC TCBOK Team	STC	Project Development and Delivery	Responsible
STC Legal	STC	Regulatory Compliance	Informed
STC Membership	STC	Beneficiary	Supports
Practitioners	At large	Beneficiary	Supports
Students	At large	Beneficiary	Supports
Professors and Teachers	At large	Beneficiary	Supports
Managers of Practitioners	At large	Beneficiary	Supports
Human Resources	At large	Beneficiary	Supports
Clients	At large	Beneficiary	Supports

3. Project Details

3.1 Project Delivery Strategy

The TCBOK Project delivery strategy is as follows:

- Development of a Project Content Taxonomy and Delivery Structure
- Selection of a Project team structure and Project management
- Identification of Project Major Milestones
- Identification of Project Assumptions
- Identification of Project Constraints and Dependencies

3.2 Project Content Taxonomy and Delivery Structure

The TCBOK Portal (hereinafter, ***Portal***) will make accessible both broad and deep information about the practice of technical communication. Through a content-managed Website or Wiki, the Portal will present a concise and compelling Web site describing the myriad facets of technical communication knowledge and practice.

Beyond its free-and-open top level of content, the Portal will provide access to a **Digital Library** and a **Professional Education Center** (PEC), both of which will generate revenue for the STC and increase value to STC members because access will be based on membership status, or fees from customers and vendors. If the STC decides to administer certificate programs and/or become involved in a certification program, the Portal will make it much easier to define curricula and to prepare study guides. In addition, the PEC would provide pay-for-access materials and training to enable STC members to complete certificate programs and/or to prepare for the certification exam(s).

We propose, then, that the Portal content should consist of three types:

- **Type 1 Content, Open to All:** The Portal's open-access content will organize, explain, and interlink the myriad topics that represent what technical communicators know and do. This freely available but STC-copyrighted content will consist of topic overviews, a selection of annotated bibliographic information, and hyperlinks. ***Read more*** links and links to STC-published content will make deeper information and more resources available to STC members or others willing to pay for access to premium content described in the next section.
- **Type 2 Content, Open to STC Members or to Fee-paying Nonmembers:** More detailed and extensive write-ups on topics in the Body of Knowledge, with selected abstracts and links to articles in the STC Digital Library and books available at Amazon.com. The STC Digital Library will consist of the archives of *Technical Communication*, *Intercom*, conference papers, conference session materials, and useful materials housed on STC Chapter websites. In addition, Type 2 content will include access to a continuously expanding, community-built online bibliographic database with entries spanning the entire literature of our field.

> ***Note:*** The bibliographic database may be built collaboratively using one of several readily available tools for this purpose. The open-source online bibliographic database application available at Zotero.com is one possibility. Using social bookmarking tools could be another feasible approach. Developed at George Mason University, Zotero is a free extension to the Firefox browser. David Dayton has already started a group database that is sharable over the Web and will have the entire online digital library of *Technical Communication* back issues catalogued in it by September 1. The database information is backed up in XML, and the only limitation so far encountered is that Zotero only works with Firefox.

- **Type 3 Content, Accessible to only Fee-paying STC Members:** Licensed-for-resale or STC-owned publications and media. All certificate-supporting and certification-related materials would fall into this category, as well as any other premium content such as webinars and STC conference session recordings (fee required only for those not attending the conference). As previously suggested, we could call the whole collection of Type 3 content the Professional Education Center.

The Professional Education Center would include these kinds of materials (and other similar products and services):

- ***Expert guides*** – specially commissioned overviews of specific topic areas, these would be peer-reviewed to a similar standard required for publication in the STC journal, *Technical Communication*. An expert guide would be an authoritative, what-you-need to know piece of approximately 5 to 10 pages similar in style to a journal guidelines or summary article.
- ***Chapters*** – from key books in the field, licensed from the publishers.
- ***Webinars*** – archived STC webinars or specially commissioned webinars on hot topics.
- ***Real-time and asynchronous online courses*** – offered by STC-vetted providers who partner with STC to create courses covering specific knowledge, skills, and abilities
- ***Video tutorial libraries*** – from Lynda.com and other training product vendors focusing specifically on tools frequently used by technical communicators

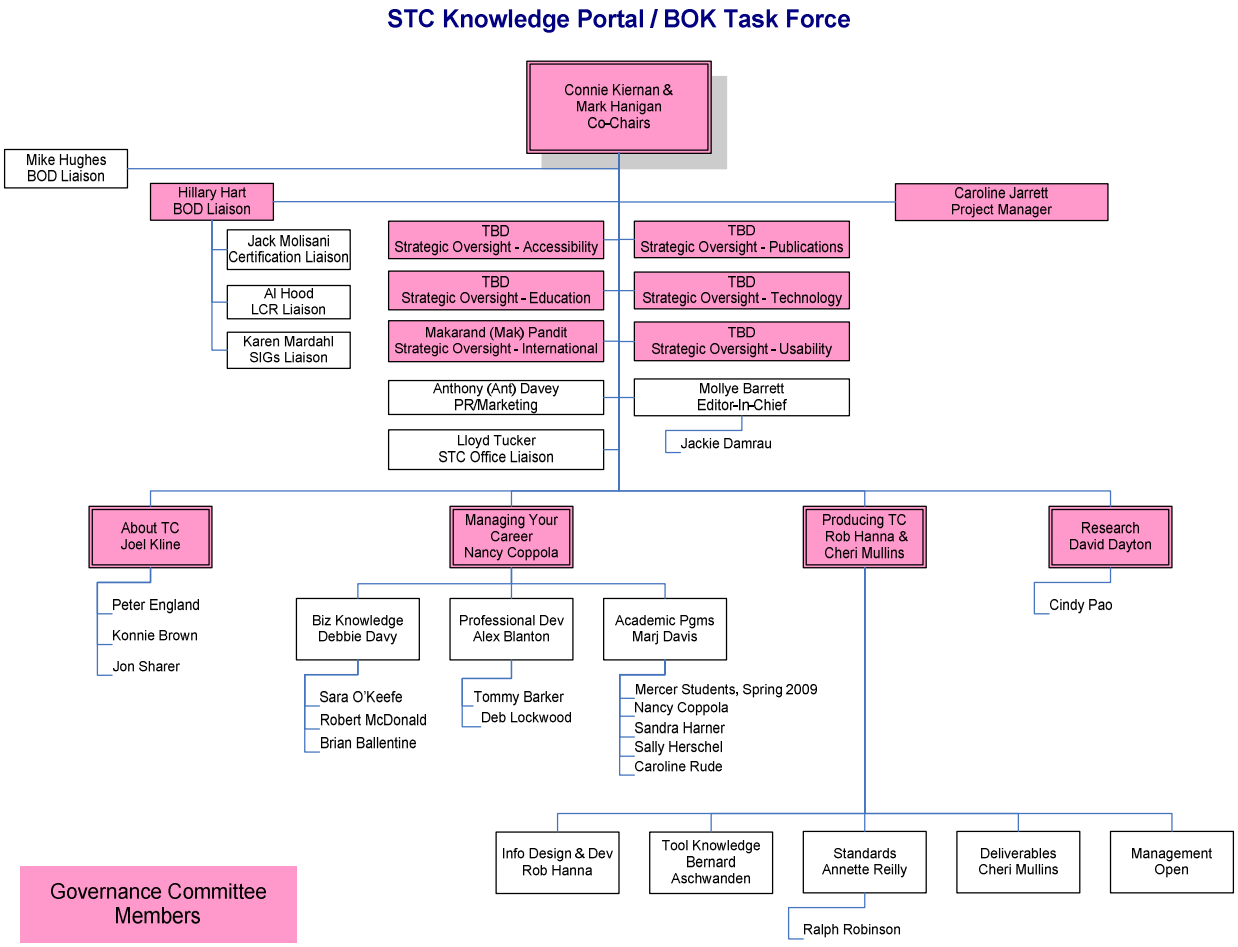
Refer to the following table:

Do types of users listed below have access to the types of material described in this row?	**Type 1:** Broad outline of TCBOK with summaries and selected links	**Type 2:** Deeper TCBOK content, Digital Library content, & online bibliographic database	**Type 3:** Professional Education Center
General public	Yes	Pay for access	No
STC member – logged in	Yes	Yes	No
STC member – has paid a premium to sign up for certificate program or a program leading to a certification exam	Yes	Yes	Yes

3.3 Project Team Structure and Project Management

All tasks that the TCBOK Task Force undertakes will be guided by a team charter, strategic plans, change management plan, and project plans that have been reviewed and approved by STC's Board of Directors.

The following figure reflects the TCBOK Task Force organizational structure as of 1 July, 2009.



The TCBOK Task Force has multiple layers of governance:

- The committee co-chairs are responsible for overall project management and communication. They ensure that the team has the right people, has the right tasks, and continues to pursue short-term tasks and deliverables while maintaining a long-term vision. More specifically, they ensure the following:
  - All knowledge portal design and content meets or exceeds the highest accessibility standards.
  - All knowledge portal content is viewed for its potential as fee-based educational opportunities
  - All knowledge portal content is applicable worldwide rather than focused on North American practices

- All knowledge portal content is viewed for its potential fee-based publishing opportunities
- All design, development, and maintenance uses the optimal technology based on requirements, ease of use, cost, and availability
- All knowledge portal design and content meets or exceeds the highest usability standards

- The project manager is responsible for developing and maintaining a complete project schedule with discrete tasks, milestones, deliverables, and target dates.
- The six strategic leads—Accessibility, Education, International, Publications, Technology, and Usability—are responsible for ensuring optimal attention to their designated area:
  - ***Strategic Oversight*** - Accessibility takes a broad view of our Body of Knowledge, ensuring that all work addresses accessibility issues, and generating ideas for revenue-producing content and products related to accessibility.
  - ***Strategic Oversight*** - Education takes a broad view of our Body of Knowledge, ensuring that all work addresses education issues, and generates ideas for revenue-producing content and products related to education..
  - ***Strategic Oversight*** – International takes a broad view of our Body of Knowledge, ensuring that all work addresses international/cultural issues, and generates ideas for revenue-producing content and products related to international/cultural issues.
  - ***Strategic Oversight*** – Publications generates ideas for revenue-producing publications and oversees the publication process from concept to delivery.
  - ***Strategic Oversight*** – Technology takes a broad view of our Body of Knowledge, ensuring that all work addresses technology issues, and generates ideas for revenue-producing content and products related to technology issues. In addition, Strategic Oversight – Technology leads our efforts to develop technical specifications and procure technology solutions for the knowledge portal.
  - ***Strategic Oversight*** - Usability takes a broad view of our Body of Knowledge, ensuring that all work addresses usability issues, and generates ideas for revenue-producing content and products related to usability.
- The editor-in-chief takes a broad view of our Body of Knowledge, developing a style guide and editorial process/plan, and ensuring that all BOK content and related revenue-producing products meet our high editorial standards.
- The PR/Marketing lead ensures that members of STC and related professional societies, as well as technical communicators not affiliated with a professional society, are aware of and enthusiastic about our Body of Knowledge and the benefits it offers, including the benefits of STC membership as related to our Body of Knowledge.
- The Governance Committee is responsible for developing a team charter, one-year and three-year strategic plans, and a change management process. In addition, the Governance Committee will arbitrate any future differences of opinion regarding content, direction, collaborative relationships with other entities, and so forth.

- The group leads are responsible for providing guidance and monitoring progress in each of the domains for which they are responsible. The current domain groups are About TC, Managing Your Career, Producing TC, and Research.
- The domain leads are responsible for leading their team in locating, developing, and posting content and links in the knowledge portal. The current domains are Business Knowledge, Professional Development, Academic Programs, Information Design and Development, Tool Knowledge, Standards, Deliverables, and Management.

3.4 Project Major Milestones

Table 3-1 lists the TCBOK Project major milestones:

Table 3-1. TCBOK Project Major Milestones

Project Major Milestone	Target Completion Date
Deliver review draft of TCBOK Project Charter to TCBOK Team for final review	31 July 2009
Deliver final Draft to Board for review.	07 August 2009
Deliver Budget request to Office	07 August 2009
Board review of Draft	11 August 2009
Final comments incorporation and signature review	31 August 2009
Populate the knowledge portal to a level that contains linkable content in each domain	30 September 2009
Complete one-year and three-year strategic plans for BOD consideration	30 September 2009
Publish portal structure on STC website: 4 levels, some content, all approved post-1999 TC Journal articles linked	15 October 2009
Document a full change management process and plan	31 October 2009
Complete a baseline project plan with milestones and target dates	31 October 2009

3.5 Project Assumptions, Constraints and Risks

The following ***assumptions*** and ***constraints*** of the TCBOK project have been identified:

- While the project is called TCBOK, the team is not creating a body of knowledge for the TC profession, but rather attempting to organize, make accessible, and connect together the plethora of information necessary to train for and practice within the profession. To accomplish this, the team is creating the architecture for a web-based portal that will provide access to a TC BOK. This portal will be owned by STC.
- In organizing and classifying existing information, the TCBOK team is also creating new content, some of which will be copyrightable and owned by STC. But STC will not own the entire BOK for Technical Communication.

- One TCBOK project goal is to provide for STC members the benefits and career help one can find already for related professions, such as Project Management (via its Project Management Body Of Knowledge or PMBOK) and Business Analysis (via its Business Analysis Body Of Knowledge or BABOK).
- Another goal is to educate the general public, politicians, and employers about the profession.
- A possible outcome of the TCBOK project is development of a TC certification program, but *that is not the goal of **this** project.*

The following ***risks*** for the TCBOK project have been identified:

- By taking on this ambitious project, STC takes a giant step towards ensuring its viable presence and driving participation in the direction of the technical communication profession in the years to come. Not taking on this project may help to ensure that STC will no longer be relevant.
- STC has very limited resources right now, and developing and maintaining the portal will require resources. It will be critical to identify quickly those aspects of the TCBOK that can be monetized and re-invested into the project and therefore into the viability of STC.

4. GLOSSARY

Table 4-1 lists and defines the terms that are applicable to the TCBOK project. Note that, while the glossary only has a single term at this point, the charter is a living document and thus, the glossary will expand as the project matures.

Table 4-1. TCBOK Project Terms and Definitions

Term	Definition
TCBOK	Technical Communication Body of Knowledge