

sound.views

the newsletter of the Puget Sound Chapter of STC

www.stc-psc.org

volume 9, issue 4 ~ mar/apr 2010

Announcing the STC Puget Sound 2010-2011 Slate of Candidates

The Puget Sound Chapter election will take place from April 7 to April 13. Currently, four candidates are on the ballot.

President

Diane Forsyth has been a tech pubs manager, instructor, writer, and technical editor for several years. She is an Associate Fellow of the STC and is an active member of the Puget Sound Chapter. Before moving to Seattle, she was a founding member of the Canada West Coast Chapter in Vancouver, BC. where she held several chapter positions, including President. She is currently the PSC Scholarship Manager and has also worked on the competitions committee. Diane received an English degree from the University of British Columbia and an Extended Studies Diploma (Interdisciplinary Studies) from Simon Fraser University. She is currently a senior editor in the Office Communications Server UA team at Microsoft.

Vice President

Kristine Haugseth has worked in the Technical Communications field for over 20 years. She has been an editing manager for five groups at Microsoft and has contributed as a technical editor to

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Coming Soon! Two Half-Day Workshops: Saturday, April 17, 2010

Topics:	Surveys in Practice and Theory / Label Placement on Forms
Presenter:	Caroline Jarrett
Time:	8:30 AM-12:00 PM / 1:30-4:30 PM
Location:	Digipen, 5001 150th Avenue NE, Redmond, Washington (map)
Registration:	Register online (http://www.stc-psc.org/upcoming-events.php) or call 206-623-8632 by 10:00 AM, April 16th
Cost:	\$35 for members; \$45 for non-members; \$25 for students (If you are unemployed, you can pay the student rate.)

about sound.views

Sound Views is published for members of the Puget Sound Chapter of the Society for Technical Communication.

Managing Editor

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Prabita Chandran
David Kowalsky
Robert Reynolds

Submissions

All members are welcome to submit articles, comments, and letters. Articles must address topics of interest to technical communicators, especially to those in the Puget Sound region of Washington.

Send articles in Word (doc), Rich-Text Format (RTF), or ASCII (txt) formats to the Managing Editor. Accompanying graphics or photos should be provided as separate files.

The editorial staff reserves the right to edit letters and articles for length and clarity.

The submission deadline for the next issue of *Sound Views* is April 15, 2010.

Reprints

You may reprint original material appearing in *Sound Views* as long as you acknowledge the source and send a copy of the reprint to the Managing Editor.

For more information about the Puget Sound Chapter of STC, visit the Web site at www.stc-psc.org.

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From the President: Gains and drains...

By Mike Brazill, Chapter President

In our February chapter meeting, Curt Rosengren talked about “gains and drains.” We all have them. The gains give us that energy to go out and take on the world and have a good time doing it. The drains suck the life out of us. One of his themes was how to maximize the gains and keep the drains to a minimum.

I’ve been thinking about some of the gains I have experienced through STC as your president this year. I’ve worked with some great people who really care about our community and are just plain fun to be around. I’ve also learned some cool and interesting things about topics ranging from Web design to electronic commerce. And I’ve been able to participate in some meaningful exchanges and events, the most recent one being the annual competition showcase. I really enjoyed this event this year! The high energy level, the productive and enthusiastic exchange of information, and the feeling of celebration all contributed to a positive gain.

We’ll have some more opportunities for gains coming your way this spring. In March, our science panel featuring Kathy Hall, Sally James, and Rachel Tompa will discuss the ins and outs of medical and science writing. In April, Carolynn Jarrett will conduct two back-to-back workshops on designing forms and conducting surveys. And we’ll have more workshops and speakers coming your way until summer.

As April approaches, I’m reminded that the end of my term is drawing near. I’d like to thank the membership for giving me the opportunity to serve as president this year. It’s truly been a rewarding experience.

Mike Brazill

chapter contacts

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Editor's Corner

By Mary Corder

This issue of *Sound Views* features articles about usability and personas, including an interview with a persona consultant in Seattle, the first of a two-part series on professionals specializing in personas and usability. Be sure to look for the second part, an interview with a usability specialist, in the May/June issue. If you are familiar with Steve Krug's 2000 book *Don't Make Me Think*, you may also be interested in our review of his 2009 book, *Rocket Surgery Made Easy, The Do-It-Yourself Guide to Finding and Fixing Usability Problems*. You can learn more about one of the chapter's sponsors, WritersUA, which also sponsors the annual Conference for Software User Assistance held in Seattle. And finally, you can also get to know the slate of officers for the 2010-2011 Puget Sound chapter election. Be sure to vote by **April 13!**

Spring is a good time to consider volunteering with the chapter. It is a great way to meet other technical communication professionals and gain experience that could enhance your resume. There are many types of volunteer opportunities, and each suits different skills and requires varying time commitments. Working with the Web team, for example, is one way to increase your knowledge of Web technologies in a tangible way—by working on the chapter Web site. You can serve on the board as a chapter officer or manager, work as a judge for the annual competition or another event, or assist with special projects on an as-needed basis.

We are always looking for newsletter volunteers. Your contribution is welcome, whether you would like to help for the year or just for a single issue. I encourage you to submit newsletter articles, suggestions, or any ideas you have for improving *Sound Views*. You can reach me at newsletter@stc-psc.org.

Puget Sound STC is on Facebook, Twitter, and LinkedIn

Puget Sound STC Facebook Group:

www.facebook.com/group.php?gid=21641844730

Puget Sound STC Twitter:

twitter.com/STCPugetSound

Puget Sound STC LinkedIn Group:

www.linkedin.com/groups?gid=2009451

Personas and Usability, Part 1

By Robert Reynolds

I've been fascinated by personas since my Microsoft days, when I would see posters in the hallways, cafes, and even in the restroom talking about Abby, the active mom; Ichiro, the IT guy; Melissa, the manager; and Toby, the teen; among others. Although my team at the time wasn't actively using these personas, I picked up on them anyway when trying to prove to the program managers why this UI or that feature needed a change. Just the mention of Abby, and they'd be transfixed. Like that.

Usability, on the other hand, was a bit more foreign to me; the only exposure I had was through the *Bug Bash* online comic strip (look it up), including one where the usability lab observers were mortified to discover the documentation the not-so-bright subjects were using had glaring typos in it ("lick the button" instead of "click").

For this issue, I interviewed two people: Tamara Adlin, a persona consultant in Seattle, and Dana Chisnell, a usability guru. I assumed both backgrounds were similar enough to put them in the same issue, but I was proven wrong, so Dana's interview will appear in a future issue.

After several years with Amazon as a senior customer experience specialist and starting the customer experience design team there, Tamara started her own consulting company, which helped clients get their teams laser-focused on who their customers are and how to follow their thinking. She has coauthored a book, *The Persona Lifecycle* with John Pruitt, and is now a co-founder of Fell Swoop in Seattle.

Tell me about your educational and professional background in regards to the work you're doing now. How did you fall into persona development?

I created my own Independent Major during my undergrad at Vassar in "art and visual perception,"

which combined art, art history, psychology, cognitive science, and philosophy. My thought was (and is) that artists have a unique insight to the way they perceive things, and that can give us additional ways to look at the science of how perception works. It was interesting, but a bit too much to bite off in an undergrad degree. After that,

I became aware of Human/Computer interaction as a field unto itself when I was working at a human factors lab that is part of the army research lab (long story how I got THAT job!). I researched grad degrees, and in 1994, there weren't really degrees in the field unless you were a coder who was interested in

design or a designer interested in coding. I was neither. I found the University of Washington's Department of Technical Communication by accident (I was sent over as "one of them" after an informational interview in the Industrial Design department). I got in and then got interested in personas when Alan Cooper's book (*The Inmates are Running the Asylum*) came out in 1999. I participated in some workshops, agreed to do a book, and just got deeper into it.

Would you say personas and usability testing complement each other? If yes, how so? Are you in agreement that both are still needed?

ABSOLUTELY, to both. Personas are a tool in our toolbox, as is usability testing. Here's how I think of it:

1. You do personas VERY early with high level stakeholders to develop focus and a shared language. Without these, I don't think it's possible to do great design, and persona workshops are a fantastic tool for this.
2. You use the personas as characters and write the "stories" you want to create for your personas.



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3. You prototype the stories as wireframes.
4. You recruit usability test (utest) participants using the personas as part of the participant screening process.
5. You utest. My definition of utesting is "finding the wrinkles in the carpet." You don't look for statistical results, you look for wrinkles in the carpet, knowing that if one or two people trip over them, tons of others will as well.

Why do companies need personas? Are most developed personas internal (used primarily during product development) or external (as an outreach tool to customers and potential customers)?

VERY internal, as far as I'm concerned. Again, to me, it's all about getting clarity from the top down. Many exec teams haven't recently been asked to clarify their business, brand, and customer experience goals, and that's my first step. I then move on to create ad hoc, or "assumption", personas. The idea is most businesses were started to solve particular problems for particular people in particular ways. Companies and teams are often so far away from being truly user-centered that just

... you look for wrinkles in the carpet, knowing that if one or two people trip over them, tons of others will as well

reminding them of those basics...particularly who the people are trying to solve problems for, and how those people

think...is a huge first step. Aligning these ad hoc personas (which in my mind, are created less out of "assumptions" than they are out of "embedded knowledge of who our customers are or could be") with the goals sets everyone downstream in the process up for success. Instead of hoping you design what the execs are looking for (and dealing with it when the execs realize that they don't want what you've designed, now that they see it), you are able to understand what problems they are trying to solve and their priorities. It's all about being able to say "According to our key stakeholders, if we don't make Paul Persona

ridiculously happy with this new product, we've failed." And being able to remind them later that "you said Paul was more critical than Jenny, but the feature you are asking for is a Jenny feature, and we'll have to punt on a Paul feature if we do it, because we can't do both. So, are you sure...?"

So how long have personas been used?

Alan Cooper did a critical thing in his book: he took an old concept that was familiar in marketing and translated it into a tool that's great for product design. Marketing is about getting eyeballs to a product; product design is about moving those eyeballs around once they arrive. So while marketing had been doing "target customer" models for years, which helped them figure out the characteristics and interests of the important eyeballs, those models didn't really help product designers (knowing we're going after suburban women aged 35-55 is great for marketing, but it doesn't tell you where to put a button). Cooper's insistence on goal-based personas, defined as very specific people (not groups of people), was a major step. So to answer your question, "personas" started getting use in 1999. There's a long history of characterizations of target users or buyers before 1999...reaching back at least as far at the 1950s in marketing.

It looks like personas work best if they are developed based on tasks and not a job position. Can you give some examples?

Sure. The easiest to grok is this: while a manager and an employee are very different in job position, in some cases, the ways they are similar is more useful to think about. So if you are designing an intranet, for example, the persona "Larry Major-Life-Change" could be a manager or employee...the point is that we need to solve for someone approaching the intranet trying to figure out exactly what he needs to do, update, etc. based on what's going on in his life. Sometimes, the goals are indeed aligned with roles (personas are a combination of roles, goals, and segment information). The key is to figure out the "differences that make a difference" in terms of

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who is coming into the product and what they think they want and need.

It appears personas are most effective if they are developed early in the product cycle. What happens if they are developed later, or if the company's business goals suddenly evolve? Are there any advantages at all to latent development?

Sure, if things change, usually people are confused about what the heck is going on. At the very least, personas can be used to clarify what just happened or is happening..."before, I thought we were going after Angela. But now, it looks like we're switching focus to Bruce. First of all, is this correct in your mind? Second, what does this mean for feature x...?" etc.

How complex/detailed should a typical persona be?

I create personas based on a very specific template. The things I always include are:

Alliterative name: for easy recall, like Sally Salesperson.

Photo: not too "stocky"—I try to get realistic looking photos.

Priority: relative to the other personas.

Key quote: one or two sentences that really capture how Sally thinks about things.

Meet Sally: what Sally does, what she cares about, etc. Usually two to three paragraphs.

Sally's questions, in her own terms: if the product was a building, and Sally was walking into the building, what are the first five (or so) questions that would come out of her mouth?

These things help everyone focus on how SALLY thinks. Then I move on with the team to create two more sections:

Our answers to Sally's questions: Until we answer the questions she has, in terms she will understand, she won't be ready to move on. You can't yell someone out of having the questions they have by doing something like "No! Click this thing instead!"

Our "Oh, by the way..." statements: These are things we can offer that Sally might not even think to ask for. This helps the team figure out the right time to tell the right personas the right things (or show them, or offer the features, etc.)

What's the best way to implement new personas in the workplace? Internal wikis? Hallway posters? Or something more tangible, such as puppets or (friendly) effigies?

Err, not puppets. I like creating posters and a handout that includes all the personas in a booklet. The handout contains varying amounts of the persona elements above, but always the name, priority, picture, quote, and usually the questions or problems we need to address for that persona in order to make them gleefully happy.

Historically, have personas been more successful in adding, or dropping product features?

Both, I think. The easy answer is "dropping features", because usually there is no lack of feature ideas in an organization

... once you start creating "stories" for "people", it gets you away from thinking about some random stack of features that sound interesting.

or product team. The personas and their priorities, really help everyone take a fresh look at the features. Having said that, once you start creating "stories" for "people", it gets you away from thinking about some random stack of features that sound interesting. Instead, you have to look at the end to end flow of the experience, so that brings up a lot of ideas and points out a lot of existing holes.

Are there any recommended ways of keeping personas from mutating during their lifecycles?

Well, you have to figure out which things you care most about. For some organizations, it's just really the names (first and last) that are going to help the most, because that's where the organization is. If there is enough interest in the personas such that people are clamoring for details (and the details are usually where things can go wonky), you've got a very good problem on your hands.

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What's the long term outlook for personas? Do you see this developing outside the business sector, for example, would a political candidate use personas to connect with voters or might government use personas to help citizens navigate through a Web site?

Sure, why not? I think some people have tried to create personas that are actually used by people ("self identify: are you a Gary or a Jennifer?") and I don't think this ever works very well, for lots of reasons. But I think any time anyone has a "product" that includes some "action" that they want some particular people to take, then personas

are an incredibly helpful way to "get out of your own head."

When is the best time to retire a persona? At the end of the product cycle, perhaps?

It depends on what the next project is. If it's a v2.0, then the personas may stick around. I think the only thing that really effectively "retires" old personas is the introduction of new ones.

Robert E. Reynolds is in his second year as a technical writer after wearing hats as a software tester and landscape designer/environmental planner. He currently works at EDIF ECS in Bellevue, and he can be reached at rer22@cornell.edu.

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several more. She has held several other positions at Microsoft as well, including documentation manager, project manager, and release manager.

Kristine has been involved heavily in the Puget Sound Chapter since 1996, serving as committee chair for scholarships, education, and employment. She has served nearly every year as a judge for the Puget Sound Technical Publications Competition and has contributed in other ways as well, such as running auctions in the 1990s that provided supplemental funding for the Souther and White Scholarship Fund. Kristine has a Ph.D. in Germanic Linguistics from the University of Texas at Austin. She is receiving the STC Fellow Award at the STC Technical Communications Summit '10 in May 2010 for her many contributions to the field of Technical Communications.

Treasurer

Debra Clark has been involved in technical communication for twelve years. She served on the STC-PSC Board of Directors for the past two years, first as Secretary and then as Treasurer. Debra has been on a lot of non-profit boards, but managed to avoid the Treasurer position until this year. Imagine her surprise to find that safeguarding chapter finances can be very rewarding. Debra earned a Technical Writing and Editing certificate from the University of Washington and a Professional and Technical Editing certificate from

Bellevue College. She also has a BA degree from the University of Washington and served in the US Army as a Russian language translator. Debra has leveraged her experience in managing non-profit organizations to bring best practices to STC-PSC board business. She would be honored to continue this service for the 2010-2011 term.

Secretary

Barbara Alban has 14 years of experience in technical communication plus another 10 years in instructional design. The owner of Northwest Creative Works, LLC, she provides technical editing and documentation development and management services in high tech environments, including information systems, telecommunications, and the software industry. She also volunteers as an English language tutor for Hopelink.

Barbara has been a member of STC for 12 years and for the Puget Sound Chapter for four years. She served as the Chapter Secretary this past year and previously served as the Chapter's Membership Chair. Barbara has earned Certificates in both Technical Documentation and Technical Editing from Bellevue College, and has a double BA in Speech Communication Studies and Psychology and an MA in Social Psychology (Conflict Theory & Management) from San Francisco State University.

Book Review: *Rocket Surgery Made Easy, The Do-It-Yourself Guide to Finding and Fixing Usability Problems*

By David Kowalsky

Nine years after writing *Don't Make Me Think!*, Steve Krug is back with a new book, *Rocket Surgery Made Easy, The Do-It-Yourself Guide to Finding and Fixing Usability Problems*. You may be like me and are thinking "Should I read this book if I don't intend to do any testing?" Krug's response: "If you give it a try, you may find that quick, informal usability testing is a great tool to have at your disposal (11)."

Krug recognizes that most people have a limited amount of time to spend reading about usability and are not on a career path to become a usability expert, so the book is carefully designed with the reasonable goal of just getting the reader to do some testing. Krug is up-front in disclosing that the focus of the teach-yourself-how-to-do-it-guide is on testing Web sites, but the same principles and methods can be used to test and

improve almost anything. Krug also acknowledges that he covers what is easiest for beginners and usually works best for most people, but his methods are not the only way that that will work.

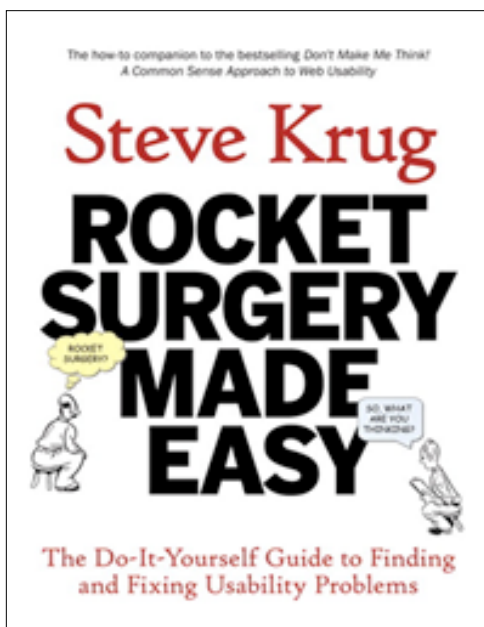
Rocket Surgery is divided into two major sections, Finding Usability Problems (Chapters 1-9) and Fixing Usability Problems (10-13). The Finding Problems section starts out by separating all the many kinds of usability testing into two categories: (1) quantitative, the kind of rigorous, formal testing most people think of that is trying to prove something, and (2) qualitative, which does not have a purpose to prove anything; it can be informal, simple, and is about getting insights to improve something. The case is clearly made that the emphasis for this book is on (2) qualitative.

The rest of the first section is all about everything that goes into creating, organizing, and carrying out a "master plan"—a round of testing once-a-month (at a minimum; of course more is okay) with three testing participants. There are also full explanations about the other people involved, including a facilitator (main organizer), observers (the people watching from a separate observation room with screen sharing software), and a hall monitor (the person helping in the observation room). The testing day scenario consists of three tests in the morning and then a debriefing over lunch. The lunch session take-aways list out the most serious usability problems the participants encountered and the problems to fix before the following month's round of testing.

The Fixing Usability Problems chapters start by covering the

important debriefing session. Then there is some general, but very practical advice about tweaking instead of redesigning and why it is better to take something away rather than add. Next is a useful "problem/how to think about fixing it" format for learning about the most likely problems.

The reader gets an incredible amount of help with creating their own "master plan": guidance on writing scenarios, checklists to follow, and an entire timeline of the testing day. The book has a companion Web site with downloadable files (examples: sample test script, guide for the hall monitor, and the checklists) and a link to a separate publisher's site with a video of an actual twenty-five minute demo usability test.



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Sponsor Profile: WritersUA

By Prabita Chandran



WritersUA specializes in providing quality training and publications for software user assistance professionals. Software user assistance encompasses a wide range of skills and technologies that are combined to make working with software a better experience for the user.

WritersUA focuses on software user assistance, a major and a very important segment of the technical communications field. The ubiquitous presence of software in the everyday life of ordinary people has highlighted the important role that software user assistance professionals play in making our software interaction and experience better. In addition to help authors and technical writers and editors, the software user assistance community comprises information analysts, document designers, software developers, publication manager, user education specialists, contractors, and consultants. Software user assistance encompasses writing, editing, planning, coding, indexing, testing, programming, localization, and standards development. User assistance includes online help, context-sensitive help, wizards, Web sites, printed documentation, and improvements to the application user interface. Developing effective user assistance is now recognized as an essential component of any application development process.

WritersUA is recognized as the premier organization in the technical communications field for enabling exchange of ideas, knowledge, and professional expertise and for providing an avenue for professional networking. In addition to providing resources, WritersUA also organizes national and international conferences and seminars. The conferences and seminars highlight new developments, in-demand expertise, and best practices in the software user assistance field. The trainings organized by WritersUA are held in high regard throughout the U.S. and the world. The annual WritersUA conference draws hundreds of attendees each year from around the world to share the latest in user assistance design and implementation. WritersUA also provides free online content for the software user assistance community. The surveys, articles, and resource directory available

on the WriterUA Web site attract over 30,000 visitors each month.

WritersUA organizes an annual WritersUA Conference that has attracted over eight thousand participants in the past eighteen years. The 18th Annual WritersUA Conference for Software User Assistance is scheduled to take place in Seattle, March 21-24, 2010. The conference features over 70 cutting-edge topics from 50 experts, project demonstrations from other user assistance developers, plus an exhibition of products and services, certificate programs, and networking events. The conference topics cover a broad range of key tools, processes, technologies, and techniques. The goal of the conference is to provide the most comprehensive and timely information specifically designed for user assistance professionals. Registration is currently open for the 18th Annual WritersUA Conference for Software User Assistance. For further information, see www.writersua.com/ohc/index.html.

The principal of WritersUA is Joe Welinske. Joe has been involved with software documentation development for the past two decades. In addition to managing WritersUA, Joe's main responsibility is to produce high quality seminars and conferences and provide the best in training and resources for software user assistance professionals. Joe also manages the Software User Assistance group on LinkedIn. He is a past President of Puget Sound Chapter (PSC) of Society for Technical Communication (STC) and currently is serving as the membership director of the Puget Sound Usability Professionals Association.

For more information about the trainings, seminars, conferences, and other resources provided by WritersUA, see www.writersua.com.

Prabita Chandran is a technical writer and editor. She has worked as a technical editor for four years, mainly on Microsoft contract projects. She took a break for traveling around the country and world, and is now reentering the field after completing the Certificate Course in Technical Writing and Editing from University of Washington. She can be reached at prabita@gmail.com.

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Not to be left out are recommendations for other books divided into the categories of "usability testing in general" and "books about fixing things."

Rocket Surgery overall is ideal for the technical communicator looking to read only one beginner-level book about usability testing. If you want a much more in-depth, textbook type approach, consider Morgan Kaufmann's 2009 book *User Experience Re-Mastered: Your Guide to Getting the Right Design*, edited by Chauncey Wilson. Also a

good place for more information is the STC Usability and User Experience Community (www.stcsig.org/usability), which has recently started a virtual book club.

David Kowalsky is a technical writer for NEC Corporation of America and a senior member of STC's Puget Sound Chapter. He can be reached at david.kowalsky@necam.com.

Scholarship Program

The Puget Sound Chapter of the STC sponsors two scholarships to assist students who are pursuing established degree programs in technical communication.

Eligibility

Students who are enrolled in the following approved two-year, four-year, and graduate programs in colleges and universities in the Puget Sound area are eligible to apply for the scholarships:

- Edmonds Community College: A.T.A., Visual Communications
- Art Institute of Seattle: A.A., B.F.A., Graphic Design
- Shoreline Community College: A.A.A.S., Visual Communications Technology
- UW College of Engineering: HCDE degrees at the B.S., M.S., and PhD level, Human Centered Design & Engineering
- UW College of Education: M.Ed., Educational Communication & Technology
- UW School of Art: B.F.A., M.F.A., Visual Communication Design
- Western Washington University: B.S., Industrial Design

Awards

Awards will be granted toward school tuition and expenses. Two \$1,000 awards are granted each year.

Schedule

The application period this year is February 1, 2010 to April 19th, 2010. Applications should be postmarked no later than **April 19, 2010**.

Instructions for applying

Submit each of the following items (download forms at www.stc-psc.org/scholarship.php):

- Completed application form
- One-page description of career goals and achievements
- A recommendation from a faculty member, ideally in the field of technical communication
- A second recommendation from a faculty member of employer
- Current academic transcript
- Samples from schoolwork or profession/workplace work