

IPR AAR - 20161206

Agenda

- [IPR/Annual Report Observation Log](#):
- Overall thoughts (John, L2s, L3s, Ron, PMs)
- Observation content log
 - IPR Document Formatting
 - IPR Content/Organization
 - IPR Process/Execution
- Copy edits
- Other
- Questions

Decisions:

| Summary | Description |
|--|--|
| IPR/Annual Report Formatting  QMA-91 - Jira project doesn't exist or you don't have permission to view it. | Whatever we did with the report, let's continue with that (report formatting/normalization) so that it is consistent in future reports. Note: check back to final IPR1 for verification. Some things were reformatted based on Towns' feedback |
| Metrics definitions  QMA-92 - Jira project doesn't exist or you don't have permission to view it. | Metrics definitions will be maintained on a wiki page. Text should be added into the "How to read this report" area that discusses a bit more about the metrics definitions page on wiki and give readers a bit more information than just being blindly sent to the wiki page |
| Static text  QMA-93 - Jira project doesn't exist or you don't have permission to view it. | Changes to static text need to come as a PCR; NOT a change in a reporting document. |

Action Items:

| Summary | Description | Responsible | Due Date |
|--|--|----------------|----------|
| Highlights  QMA-94 - Jira project doesn't exist or you don't have permission to view it. | Discuss with John: Google Doc should have all highlights in it so that people can review it. Is there a better way to get these highlights, which sometimes contain images, in the Google Doc so that the text always makes sense (ie if images are missing but text references images, then there's a problem). | Kandace Turner | |

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|--|--|--|--|
| <p>Text consistency</p> <div style="border: 1px solid orange; padding: 5px;">  QMA-95 - Jira project doesn't exist or you don't have permission to view it. </div> | <p>Text consistency when a target is met: Does John want specific text here so it's consistent throughout the report? If he does not have a preference one way or another, then PM&R should make the decision.</p> | <p>Ron Payne Karla Gendler Scott Wells</p> | |
| <p>How to read this report</p> <div style="border: 1px solid orange; padding: 5px;">  QMA-96 - Jira project doesn't exist or you don't have permission to view it. </div> | <p>Area regarding how the report should be read needs to be created sooner than later so that we are not scrambling to come up with it during next reporting time.</p> | <p>Leslie Froeschl</p> | |
| <p>AM/KPI indication?</p> <div style="border: 1px solid orange; padding: 5px;">  QMA-97 - Jira project doesn't exist or you don't have permission to view it. </div> | <p>Area Metrics that are also KPIs, should it be indicated that they are both?</p> | <p>Janet Brown</p> | |
| <p>Metrics definitions</p> <div style="border: 1px solid orange; padding: 5px;">  QMA-98 - Jira project doesn't exist or you don't have permission to view it. </div> | <p>Metrics definitions should be maintained on the wiki and linked to in the report.</p> | <p>Scott Wells</p> | |
| <p>Common changes</p> <div style="border: 1px solid orange; padding: 5px;">  QMA-99 - Jira project doesn't exist or you don't have permission to view it. </div> | <p>List of words/phrases that are checked/corrected needs to be added to the Wiki</p> | <p>Laura T. Herriott</p> | |

Notes:

- **IPR/Annual Report Observation Log**
 - This log will be a Google Sheet that will have a tab/sheet for each report.
 - This is for PMs to document issues, problems, and questions resulting from reports.
- Overall Thoughts
 - Positive
 - Scott- Did not receive anything directly from John. Things seem to have gone well. Everyone
 - Karla- Heard feedback from L3s: "Is this really all we have to do because this is easy."
 - Ron- It was well-planned. Pleasantly surprised
 - Overall things went smooth and different L2/L3 groups were surprised at the simplicity
- Feedback
 - Responses from L1 need to be received at the end of day 1 of L1 review so that responses can be received by day 2.
- Document/ Formatting

- Discuss with John: Google Doc should have all highlights in it so that people can review it. Is there a better way to get these highlights, which sometimes contain images, in the Google Doc so that the text always makes sense (ie if images are missing but text references images, then there's a problem).
- Content/Organization
 - There are consistency issues to figure out.
 - Text consistency when a target is met: Does John want specific text here so it's consistent throughout the report? If he does not have a preference one way or another, then PM&R should make the decision.
 - We need to add a how to read the report area to the report. This must be finished before next report so that we are not scrambling to do it during the report writing period.
 - Questions following the tables must be removed when inserting L2/L3 text (the questions that follow the tables)
 - Footnotes: Dash for annual metric, superscript numbers underneath the table.
- Outside of the L2 areas, the non-L2 (Sp Forum, UAC, Finance, PIF) areas need to be identified as the reporting liaison and need to have comments sent their way. Have we notified chairs of these 4 areas that during a reporting period, Towns may have questions for them and we'll need a quick turn around? They don't have a PM working with them, so we need to make sure this is communicated to them that this is a responsibility for them.
- Static texts: should we ask those who are doing copy edits to even look at that section? As long as it has been reviewed once, it does not need to be reviewed again. Therefore there don't need to be any copy edits. Changes to static text need to come as a PCR; NOT a change in a reporting document.
- Common changes: List of words/phrases that are checked/corrected needs to be added to the Wiki. To be further discussed on how to properly implement changes (who should make the final check for these things to be changed?)
- John's review should be broken into two different 1-day activities. Day 1: Initial review and comments. Day 2: Review of content owner responses
- Copy edits
 - Was the process efficient?
 - Will be more efficient. One person did a complete look at the report, then a second person reviewed (And added edits as needed).
 - Google document's tracking ability makes this process more efficient. We don't want copy editors accepting changes that they proposed. Someone else needs to accept them.
 - The sooner we can get a style guide together, a lot of confusion will be cleared up.
- Report time period
 - Is the time allotted sufficient? No. Perhaps we could produce a better report if given more time. We need to figure out a better way to make the case of needing more days so that report-related activity can be done during the business week
 - With our current very tight reporting timeline, we are taking on a lot of risk that doesn't have much room for unexpected events coming up.
 - If we're going to make a case for more time, approach it as going through each area and state how much extra time is needed that will also be value-added by the addition of time.
 - Also state how there's no buffer built in and if weekend dates are included in the schedule, then the weekend, which previously were the buffer, are completely gone.
- Overall execution
 - Is a style guide doable before the next IPR? Yes. Will be written and posted to the wiki.
 - If Kristin requests any thing from any of the PMs, please be sure to respond quickly.