2004 ISSUE COMMITTEE REPORT

Presented on April 16, 2004

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2004 CFP Issue Committee Report
April 16, 2004   Chandler, AZ

Issue Status

Issues accepted	93	2 special Board Issues accepted after deadline 1 Issue sent prior to deadline reported after Issue assignment was completed
Issues rejected	0	All Issues were submitted electronically.
Issues accepted written	<10	Reasons for revisions: spelling and grammar, as inaccurate recommendations, brand names
Added Service		Print all files. All Issues for a specific Council are linked to create one file for printing. Instead of 93 separate Issue files, there are three print all files – one per Council.
Issue Committee e-mails - 2004 Issues and related Discussions	636 incoming 873 outgoing 1509	

Copies of all correspondence will be given to Conference Chair during the Conference.

Total expenses
Issues Chair

Calls:	$ 34.91	(near deadline corrections, repetitive communications, Committee member questions, discussions with Trevor)
Conference call	$ 17.79	(Council Chairs – final Issue assignments and Conference discussion)
Shipping:	$ 19.37	(Trevor requested that I download some of the large attachments and ship them overnight)
Total	$ 72.07	

This does not include expenses for travel to Board meetings. I will have minimal expenses for mileage and food during the 2004 meeting since I live in Phoenix.

Issue Committee Report Summary

A. 2006 Issue Revision
1. Redesign Issue process (form, submission, confirmation, collation, distribution, scribe versions, and conference proceedings).

2. Go electronic. This means Member mailings, newsletters, Issue submission, Issue Committee communication, Programs, and Issue mailings to the members prior to the Conference, as well as proceedings.

B. Submission Process
1. Do all committee Issues or just the report Issue need to go to the Council Chairs?

2. All Issues must be submitted to Conference contact (Issue Chair).

3. All committees should submit reports attached to Issues. The home page should list all committees and contact members (standing included).

4. Further clarification of the Conference Vice Chairs responsibilities is recommended. Do they simply contact and remind or is there responsibility to chase the reports or even submit Issues indicating no report submitted? The Council Chairs and Vice Chair should be monitoring Committee progress during the two year period to minimize the no work or no report situations.

5. Recommendation: Submit all Issues through the Home Page, for example Issue Chair@foodprotect.org. All Issues are accepted and all corrections are sent and received through the same address – no duplication needed.

C. Current form
1. The document and full process needs to be simplified. Create one document that can be used through the entire process. In past years, the proceedings have taken large amounts of time to create. Scribe versions and proceedings were different documents from the Issues themselves – or at least severely edited versions.

D. Recreate the instructions.
1. Emphasize format standardization and accuracy of form
2. Define and limit use of attachments.
3. Reject forms as needed

E. Timeline.
1. The Conference needs a 2 year cycle detailed timeline. This timeline can be general until a Conference date is finalized. For example
   120 days prior – Mail to CFP member, state agencies and members.
   75 days prior – Issue receipt deadline

2. More guidance is needed for Committee and Council Chairs. Conference Chairs, Vice Chairs, Board members, Committee and Council Chairs do not have an organized guidance document with timelines included. It is not well defined what they need to do and when.

Issue Committee Recommendations and Report

A. 2006 Issue Revision

1. Select the Issue committee early for 2006 conference. Use them as a working committee to redesign Issue process (form, submission, confirmation, collation, distribution, scribe versions, and conference proceedings).

2. Finalize the form and post on web site at least 12 months in advance. Several Issues were submitted on the old form. The 2004 version became available September 2004.

3. Go electronic. This means Member mailings, newsletters, Issue submission, Issue Committee communication, Programs, and Issue mailings to the members prior to the Conference, as well as proceedings. Posting them on the home page and sending an e-mail that they are available will save costs and time. If the Issue form or instructions contains the date that the accepted and assigned Issues will be posted, then no e-mail to members will be needed to announce that they are posted.

4. If changes are made, then they can be made easily on the Home Page. This method can also be used to minimize use of .zip files which concerned a few members due to potential for viruses. There are free programs on the internet that allow multiple files to be downloaded with a few keystrokes rather than downloading one file at a time. Just as Adobe Acrobat reader is available free of charge, the sources for these programs can also be posted.

5. Use the extra time created from electronic posting (see A 3) for the Council Chairs pre-review of Issues from the Committees (B 4) and Council assignment by the Council Chairs. Council Chairs need more guidance on this pre-review responsibility.

   Do all Issues from committees get reviewed by Council Chairs or only the Report Issue with attached report? What are the Council Chairs responsibilities? Is there an Issue? Is a report attached? Is the report appropriate and complete? Has it been submitted or should the Chairs submit to Issue Chair as chain of communication to confirm that they have reviewed the Issue?

6. Create a new form to eliminate problems from this year. CFP needs a document that is a/an
   a. Readily available format (Word or Adobe Acrobat)
   b. Independent document file that can be circulated outside of the home page (committee discussions, etc.) (Word or Adobe)
   c. Document that is easily edited (Word).
   d. Document that is standard in formatting and limits the length of text.
   e. Document that is easily edited to Scribe and Proceedings versions.

   I contacted a programmer to see what options existed. It appears that Word is the best option. The template function in Word 2000 is too limiting for submitters and Issue Chair. Information received recently indicates that Word 2003 template may

act differently than 2000. 2003 or other versions may allow a form to be created that has the restrictions we need, flexibility for scribe and Council usage, and allows the flexibility submitters need

We need a Word document that restricts changing formatting (font size, margins, etc) without eliminating special functions like spell check, underline and strike out.

If 2003 or other versions do not allow this flexibility, we may need to stay with a Word document format with very specific instructions to the submitters. "Do not change formatting or Issue will be returned for correction". If a template will do all of this, use the template. If not, use a standardized Word Document with threat of rejection if changed.

By removing the logo from the form, it will greatly reduce the size of the files. Linked documents can then be easily e-mailed. The logo on every page increased the size of the files making it impossible to e-mail easily.

7. Reword the form to make it very clear what wording to use. This is primarily related to the recommendation sections – what can the Conference do? It cannot change the wording of Regulatory codes; it can recommend changing the wording or write a letter to recommend a wording change. Recommendations should reflect an actual action that the Conference can do. In the past recommendations have ranged from blank, to rewrite the US Food Code, to train inspectors, to do technical research.

8. Define and Revise Issue submission through proceedings process.

B. Submission Process

1. There was some confusion when one person submitted multiple Issues (not the contact person on the Issue) to Trevor. Then Marsha had to respond to the submitter for corrections. In one case the submitter was unavailable for extended time period.

2. Some Issue contacts were incorrect (e-mails), others were unavailable. On a few Issues, I sent the Issue to multiple persons until I received a response. This was critical on the last few days before the deadline.

3. Some people submitted Issues and/or revisions simultaneously to Trevor and Marsha. We need to eliminate the duplicate submissions to the Issue Chair and Executive Secretary. By submitting to one person and returning corrections to another, there was a lot of confusion.

There was additional confusion when editing was sent to the submitters. People returning edited versions did not know who to send them to – so they submitted them to Trevor **and** Marsha. In a few cases, Trevor assumed it was a new Issue and assigned a new number. This meant extra work to make sure they were not duplicates (wordsmithing was significant in several Issues).

4. Clarification on committee report submission is needed – do all committee Issues or just the ones attached to the report – go to the Council Chairs. Some committee reports were submitted to Council Chairs without Issue forms. One Council Chair volunteered and wrote all the Committee Issues.

   Board Action: Committee reports (and Issues) are to be reviewed by Council Chairs prior to the Committee submitting the Issue and report (as attachment)

5. We need to make sure that the Committees know that this is a review process and that the Issue (once approved by Chair) must be submitted to Trevor. The alternative is to have the Council Chair submit the Issue once approved. This would be efficient since the Issue Chair would then know that the Issues and Reports were "cleared" by the Council Chair as required by the Board.

6. Several committees failed to submit reports or Issues. Significant discussion occurred when committee members submitted summary documents instead of the reports – with no Issue attached. In this case the content reflected branding and was declined (no Issue attached = no Issue submitted) and there was no evidence that it was a committee report.

   Further clarification of the Conference Vice Chairs responsibilities is recommended. Do they simply contact and remind or is there responsibility to chase the reports or even submit Issues indicating no report submitted.

   I believe an Issue should be available for each committee – it will help track actions over the years rather than just creating a gap. A template for no report or no action from a committee can be created. The Conference Vice Chair can submit an Issue based on this template. This creates an Issue and allows discussion during the Conference. With no Issue (regular or special) submitted, the topic is dead. For example, if a 2004 committee is created this year and no activity occurs, then there needs to be a 2006 Issue submitted. The Council can then review the guidance and see if a committee needs to be re-created to address the original or modified content.

   The Council Chairs and Vice Chair should be monitoring Committee progress during the two year period to minimize the no work or no report situations.

7. We need more defined action on how to handle the committee report submissions. Are all committees, including Board Committees, submitting reports prior to the Conference?

   The Issue report is usually provided at the Conference since the work of the committee begins and ends after the deadline for Issues. Bylaws committee always has several Issues with attachments and provides a report at the Conference. Resolutions reports at the Conference. Is there a report from other standing committees – for example CFP ANSI committee? Is there an established process?

8. Recommendation: Submit all Issues through the Home Page. Create an Issue Chair@foodprotect.org. It is much easier to reply to an Issue with suggested

corrections than to retype the Submitter's name. It is also very difficult for the Issue Chair to know what changes were made prior to receiving the Issue.

Create a directory on the Home Page. Allow the Executive Secretary access as needed. Forward the IssueChair@foodprotect.org messages and attachments directly to the Issue Chair automatically. When possible, have the web page auto reply that the Issue was received and include date and time. The reply should also include the remaining process (including the fact that the Issue is not accepted until the Issue Chair actively confirms receipt).

All Issues are accepted through the one address, all corrections are sent and received through the same address – no duplication needed. The Executive Secretary can have access to the account as needed.

Prior Board action stated that all Issues go to the Conference Executive Secretary (to use a single contact address). Using the Web Page creates a single contact address for Issues.

9. Using the IssueChair@foodprotect.org simplifies organization of Issues to send to the Committee. The Issue Chair can enter the tracking numbers as they are approved rather than when submitted. This will allow the Issues to be finalized and sent to the Committee members more easily than in past years. The current system assigns tracking numbers as they are submitted, created holes in the approved list. For example if there are 10 Issues being revised, the list may look like
   001
   002
   003
   006
   007
   008
   010

Although the numbering system used allows us to add the remaining Issues and the order will be correct, it is confusing to have gaps in the list. By numbering accepted Issues, then the Issues can go to the Committee members as received rather than waiting for changes or the final deadline.

C. Current form

1. Using a Word Template form maintained the formatting, margins, minimized some text box lengths and prevented submitters from typing into the Conference only section. Issues were much more uniform than previous years. Executive Secretary comments on cleanliness of Issues several times.

2. The Word Template form locked out spell check and special features (underline, strikeout etc.). This is a major problem when a document is quoted and suggested changes are inserted, for example word changing for the US FDA Food Code. It also blocked text making it difficult to edit. This increased the work load significantly.

It may also make Council I discussion more difficult – strikeouts allow the Council to easily see the original and recommended changes simultaneously.

3. Many submitters complained about the process. Some even commented that they did not follow the instructions (spell check prior to copying into the form) because it was more work and they knew we would do it anyway.

4. Unlocking the text prior to submitting for corrections did not help significantly – spell check highlighted phrases not words. For example, misspelling a single word may have highlighted a full phrase. When a correction was made the entire phrase was deleted and reinserted. In the template the sentence would look like ~~*Unlocing the text did not help significantly*~~   *Unlocking the text did not help significantly*. Further research is needed to see if Word 2003 has solved these problems.

   Although the final results were to insert one letter it looked like a whole phrase was deleted. Some submitters reacted very negatively. Most submitters were frustrated that entire sentences were deleted. Through multiple correspondences they were able to understand the correction, but it was time consuming and labor extensive.

   While working with the scribe trainer on the scribe versions, we discovered that unlocking the form to allow easier editing using Word 97 deleted text typed into text boxes. The blank Issue form and all submitted Issues were in locked format. When the document was unlocked and then locked, the text boxes were blank. This is probably what happened on one Issue that had one text box content missing on the CD and early postings.

5. Template formatting limited the ability to clean up the Issues, for example creating a one page document when there was only one line on the second page or creating a Print all document. This meant hand centering and that the proceedings versions will have to be edited by hand instead of just linked as planned.

   Until I discovered an additional padlock on the text boxes, I was unable to use the mouse to highlight sections or strike out phrases as highlighted. (The locked text was highlighting entire sentences, paragraphs and phrases – not just words that were intended to be highlighted.) This function is critical to scribe efficiency.

   This locking is a toggle – it locks the text boxes or the text outside the boxes. If the form is used as is, scribes will have to lock and unlock the boxes to enter text (Conference area versus text boxes). The Scribe trainer was working on removing text from the boxes as this report was written.

6. The document and full process needs to be simplified. We need to create one document that can be used through the entire process. In past years, the proceedings have taken large amounts of time to create. Scribe versions and proceedings were different documents from the Issues themselves – or at least severely edited versions.

   If we create a simple form that can be edited to create the scribe version and use that version as the proceedings version, we can write a general format for

description (update every two years) and link the final results. This should speed up the proceedings process significantly. Actually using Word to "link" the documents may also be possible rather than hand combining all the Issues. This would eliminate the need for two folders, linked documents and individual documents. We might be able to create one link document and use if for future conferences also – one linking form that can be used repeatedly.

The 2004 document versions were designed to begin this process but limitations within Word 2000 created significant problems and time consumption for the Issue Chair.

D. Recreate the instructions.

1. Emphasize that formatting can not be changed.

2. Contact information must reflect the person submitting the Issue and the person to be contacted for a rapid response. Some people were out of touch for more than a week. If this is near the deadline, then the entire process is delayed. The timeline does not allow for delays.

3. More and lengthier attachments are being used. Some people are inserting references and information that should not be in the Issue itself. Limit the Issues to 2 pages. Explain the limitations on the text boxes. All other information can be in the attachments. Limit the attachments. Include information on referencing and attaching copyrighted documents.

E. **Timeline.** The original timeline for the Conference is created by the Executive Secretary. The 2004 timeline was sent to Board members and posted on line. The Issue timeline is based on that time line. After an error was found on the original Conference timeline, the Issue Committee timeline was corrected. These changes caused some confusion within the Committee. (Corrections and explanations were sent.)

1. The Conference needs a 2 year cycle timeline. This timeline can be general until a Conference date is finalized. For example
   120 days prior – Mail to CFP member, state agencies and members.
   75 days prior – Issue receipt deadline

2. This timeline should be very detailed (Committee report deadlines to Council Chairs)
   a. There needs to be more specific guidelines for the calendar information. For example, is it working days or calendar days? If a date falls on a weekend or holiday do we shift plus or minus to allow Issue submission on a work day rather than a holiday. Moving one or two days for a few deadlines can shift the final deadline by more than a week (business days)

3. More guidance for Committee and Council Chairs. One kind Chair wrote most of the committee Issues for the Council. This created a major workload during a critical time period (committee Issue assignment deadline, Committee report review). Council Chair, Conference Vice Chair, and Issue Chair responsibilities

have expanded over the past years. This information needs to be examined, organized, and captured in documents to help future participants. Verbal history is no longer adequate communication.

Conference Chairs, Vice Chairs, Board members, Committee and Council Chairs do not have an organized guidance document with timelines included. It is not well defined what they need to do and when the deadline occurs.

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2004 CFP ISSUES TIMETABLE

Dec 19, 2003 (120 days)	Mailing to CFP 2002 registrants, state agencies and members. Issue Submission Form (due Feb 02, 2004)
Feb 02, 2004 (75 days)	Deadline for receipt of Issues; Issues forwarded to Issue Chairperson as they are received
Feb 04, 2004	Final shipment of Issues to Issue Chairperson
Feb 06, 2004	Issues and work sheets shipped to Committee members and Council Chairs
Feb 12, 2004	Worksheet 1 (individual committee member recommendations for Council assignments) e-mailed to Issue Chairperson from Committee members
Feb 13, 2004	Worksheet 2 (compilation of committee member recommendations for Council assignments) e-mailed to Council Chairs
Feb 19, 2004	Conference Call to finalize Council assignments
Feb 20, 2004	Worksheet 3 with Council assignments e-mailed to Council s
Mar 01, 2004	Worksheet 3 with Council assignments and Issue sequence e-mailed to Issue Chairperson
Mar 04, 2004	Final Issue assignment recommendation to Executive Secretary
Mar 18, 2004 (30 days)	Exec. Sec'y mails Issue packets to registrants, delegates, Executive Board and Council members

Note: Issue deadline is defined in the Constitution and Bylaws. The original Conference deadline, including the Issue deadline, was created by the Executive Secretary. The 75 days was interpreted as "at least 75 days" not 75 days. Work days versus calendar days can make this a difficult decision.

The deadlines had been shifted to allow more time after the submission deadline for Conference processing. Submitters had less time to allow for submission or discussion of Issues prior to deadline. One regional meeting had scheduled their meeting based on the 75 days prior, discovered the error, and contacted the Executive Secretary and Issue Chair.