MACPAC Report Process

Below is an outline of [MACPAC’s report to Congress production process](https://macpacgov.box.com/s/jr8yplh8yaitfjb8aqahglg4a4g2nw02), to provide a sense of the steps and time constraints entailed in producing the March and June reports. However, because every report cycle has its own glitches and challenges, the timeframe may shift slightly to accommodate unforeseen events.

## Writing the chapter

(March report, September–January; June report, January–April)

* chapter authors develop chapter content in fall/winter (for the March report) or winter/spring (for the June report)
  + chapters that are adapted from prior meeting memos and presentations need to be adapted to the style and tone of a chapter
  + the decision about when material is ready to become a chapter is made jointly by Kate, the author, and supervisor
* authors should choose a buddy to serve as an internal reviewer, and work with their supervisors and Kate to facilitate internal review
  + the policy team can serve as a helpful resource to bounce ideas off
  + the buddy is another member of the policy team who is willing to read drafts and provide comments that improve framing, clarity and accuracy (please refer to the [MACPAC style guide](https://macpacgov.box.com/s/l8mxevspo8wu5rhkisrgwcswzuvtdhtr) for general guidelines for proofing and editing
  + supervisors will also review drafts prior to Kate’s review
  + note that draft chapters undergo more rounds of internal review than other meeting materials

## Reviewing the draft chapter

(March report, December–January; June report, February–April)

* draft chapter is presented at the December or January meeting (for the March report) or March or April meeting (for the June report)
  + chapters may be presented at earlier meetings if ready
* draft chapter is sent out for Commissioner review with meeting materials a week in advance of the meeting
* draft chapter sent out to external reviewers at the same time that commissioners receive it
  + external reviewers should include subject area experts that represent different points of view
  + there should be at least 3 external reviewers (beyond CMS and NAMD)
  + if the chapter is based on a contractor’s work, that contractor should be asked to review the draft
  + the list of reviewers should be approved by Kate prior to the author contacting them
  + Kate typically facilitates review with CMS and NAMD
  + reviewers should be contacted 2 weeks prior to the mail out to confirm their willingness to review and the timeline for review
  + reviewers should be given one week to review the materials
  + author limits editing options prior to author sending to external reviewers
  + names and contact information (titles, organizations, mailing addresses, and emails) of reviewers and contact information should be sent to Caroline and Melanie for separate thank-you notes and to include in the acknowledgements.

## Post-commission meeting editing and polishing

(March report, December–February; June report, March–April)

* compile comments (commissioner and external reviewers) for discussion with your supervisor and Kate
* incorporate feedback from all reviewers
  + changes should not be made that are inaccurate or deviate from the sense of the Commission as expressed during the public meetings
  + staff should work to incorporate multiple points of view from reviewers (e.g., on the one hand, on the other hand)
* buddies and supervisors reread the draft chapter—this is an opportunity to catch mistakes and polish writing—at least a week is reserved for this step so authors have the time to consider changes
* Kate and Caroline review

## Copy editing

(March report, February; June report, May)

* final version of chapter to copyeditor for copyediting (tables and references may go first)
* chapters should be sent to copyeditor on a rolling basis after the edits from the tech review and Kate and Caroline have been incorporated
* incorporate edits (this is the stage to make editorial changes if necessary, but do not accept changes that alter the meaning in a way that is incorrect)
  + this is your time to finalize the writing—no wordsmithing **after** this point
* draft key points
  + key points should be less than 400 words
  + do not write your key points by collapsing your chapter—the order of the key points may be different than how the chapter is structured
  + Copyeditor, Kate, and Caroline review before these are sent to Carolyn to format

## Formatting

(March report, February; June report, May)

* Caroline sends chapter and key points to Carolyn; the expectation is that the chapter is as close to perfect as it can be and showcases authors best work
  + production now moves onto a fast track
* Carolyn returns full chapter on a rolling basis
* Caroline will send authors a PDF for review
* author and buddy reviews formatted version—this is your chance to do a full read to catch any errors
  + confirm layout (e.g., figures are in the right place, all tables are included)
  + be prepared that figures and tables may not appear in your desired location—Carolyn works to minimize white space
  + correct inadvertent errors—but **no** wordsmithing at this stage
  + double check to make sure abbreviations and acronyms are called out correctly
  + confirm formatting (e.g., headings in the right font/size, legends, notes)
  + double check data
  + double check table and figure titles and notes
  + confirm that sources, citations, endnotes, and references are in the correct format

## Final proof

(March report, February; June report, May)

* author and new, specially designated buddy review final formatted version
* author will need to ask someone who has not been involved in the drafting process to provide fresh eyes for the final proof
  + Carolyn returns the complete proof
  + final edits will be limited to at most 48 hours—reviewers should only be doing a final check of data and looking for typos at this stage
* last chance to catch typos but too late to change table/figure placement or rewrite text
* **ONE** master copy is provided in Box. Reviewers sign out a time to review and lock the document while editing. Unlock the document when you are done. Allot yourself at least an hour.
* No wordsmithing
* Caroline confirms Carolyn has made changes
* Kate final read
* off to the printer

## Report delivery

(March report, February–March; June report, May–June)

* Communications update and finalize hard copy hand-delivery, priority mail, and media mail mailing lists (month prior to publication)
  + Joanne reviews hand-delivery list; authors confirm list of reviewers for thank-you notes; list includes reports to be couriered (month prior to publication)
  + Melanie sends priority and media lists to mail house and approves samples (end of month prior to publication)
* Kate obtains wet signatures for transmittal letters from Commission chair
* Kate emails electronic copy to commissioners
* Kate emails electronic copies to majority and minority staff of authorizing committees one day prior to release
* Communications hand-deliver reports to Hill at 9am the morning of release
* email blast releases report to full MACPAC mailing list at or before noon

## Data archiving

(March report, March; June report, June)

* after report is final, authors should archive data associated with any figures or tables in the report (for instructions, go to Box [data archive](https://macpacgov.box.com/s/gytigt9hahe7mnqdx8mz5ve4w4kqoz82))