

Enhanced Document Shepherding

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Document Shepherding and RFC 4858

- RFC 4858, “Document Shepherding from Working Group Last Call to Publication”, defines the role of the document shepherd
 - Shifts work from the responsible AD to someone who is specifically responsible for the subject document
 - Provides another set of eyes to follow the comments and discussions on the document as and after it leaves the working group
- Started with WG chairs and secretaries as shepherds
- We have moved toward sometimes using other volunteers as shepherds, appointed by the chairs

Document Shepherding and RFC 4858

- RFC 4858, Section 1:

The primary objective of this document shepherding process is to improve document-processing throughput and document quality by enabling a partnership between the Responsible Area Director and the Document Shepherd.

- Establishes the shepherd writeup:

The goal here is to inform the Responsible Area Director about any issues that may have come up in IETF meetings, on the mailing list, or in private communication that they should be aware of prior to IESG Evaluation of the shepherded document. Any significant issues mentioned in the questionnaire will probably lead to a follow-up discussion with the Responsible Area Director.

Document Shepherding Goals

Broadly:

- The shepherd must keep the document moving forward, communicating about it with parties who review and comment on it.
- The shepherd must obtain the working group's consensus for any substantive proposed changes.
- The shepherd is the leader for the document and for the working group, and maintains a critical and technical perspective.

Document Shepherding Tasks

Specifically:

- Providing the Document Shepherd Write-Up accompanying a document that is forwarded to the IESG when publication is requested.
- During AD Evaluation, managing the discussion between the editors, the working group, and the Responsible Area Director.
- During an IETF Last Call, following up on community feedback and review comments.
- During IESG Evaluation, following up on all IESG feedback ("DISCUSS" and "COMMENT" items) related to the document.
- Following up on IANA and RFC Editor requests.

Enhanced Document Shepherding

- Page on the working group chairs' wiki:

<http://wiki.tools.ietf.org/group/wgchairs/wiki/ExtendedDocumentShepherding>

- Sets out a timeline, with stages in a document's life cycle
- Sets out shepherding tasks at each stage
- My suggestions are what's out there
 - It's on the wiki
 - You can add your own ideas

Enhanced? How so?

- Emphasizes the depth and follow-through
 - 4858 never meant for shepherding to stop after the writeup
 - Yet much shepherding does stop there
 - This lists specific tasks to highlight what can be done at each stage
- Encourages getting others involved
 - 4858 specifies WG chairs as shepherds. Chairs have other WG tasks.
 - This suggests using non-chair shepherds more, at the chairs' discretion
- Starts earlier
 - 4858 starts at WGLC, but many documents languish during development
 - This suggests active shepherding while the WG is doing the work

Stages of a Document's Life Cycle

- Call for Adoption
- Working Group Document
- Working Group Last Call
- Shepherd Writeup Underway
- AD Evaluation
- IETF Last Call
- IESG Evaluation
- Approved by the IESG
- AUTH48

Some Examples: IETF Last Call

- Monitor the last-call comments, and make sure that specifically requested reviews arrive.
- Make sure the Document Editors respond to all reviews and comments in a timely manner.
- Keep the dialogue going between the community and the editors until all issues have been dealt with.
- See to it that issues are brought back before the working group if they are significant enough to require it.

Some Examples: IESG Evaluation

- Keep track of the DISCUSS positions and review comments by the IESG.
- Make sure all comments are addressed, and help the discussions of DISCUSS positions reach closure.
- Keep both the Document Editors and the Discussing AD engaged in the resolution of the issues.
- See to it that issues are brought back before the working group if they are significant enough to require it.

The Point Is...

- The point is to have someone responsible for overseeing the document and doing what needs to be done to make progress.
 - Nudging authors
 - Nudging reviewers
 - Nudging chairs
 - Nudging ADs
- All the way from the initial presentation to the working group, to RFC publication
 - IF that's appropriate for the particular working group
 - *Chairs still manage their working groups*

