

Guideline No. 1

First, develop a database for AIs if one does not already exist. Then, periodically clean it up. If AIs are old and over-come by events, delete them. Continuing to carry old actions is a sign of a program going (or gone) "south"—indicating the existence of either tough problems that no one is stepping up to solve, or a general apathy about whether or not assigned actions are completed.

Guideline No. 2

Be judicious in accepting responsibility for AIs. It is often appropriate to simply pass along an action to another person, office, or organization and be done with it. This is especially true of actions that can be resolved as a matter of normal business. Ask the question, "Do we really need a formal action item to accomplish this?" In addition, just because someone asks a question doesn't mean you have to give an answer. Often, questions come up that other organizations should answer in other forums. Smart action officers resist the urge to get involved in this type of activity.

Guideline No. 3

Enforce due dates and personal accountability. The AI database custodian should remind all AI responders of upcoming due dates. It is generally not enough to say, "Ensign Chekov, AI #579 is due next week." The reminder should include enough information for the responder to understand exactly what action is required—maybe even a copy of

the original action. The AI responders should be expected to provide AI status before the meeting in which AI status is reviewed. Extensions of the due dates can be granted, but should only be considered prior to the status meeting. Asking for an extension at a meeting often sounds like: "Sorry, I have not taken the time to look at my responsibilities ahead of time, so now that I'm finally getting around to it, can I have more time... (not to do anything)?" We should not let our folks get into this situation.

Guideline No. 4

Real-time AI closure is possible in some situations. For example, if Sulu has an AI to send a report to Capt. Kirk, his report should include a line that states: "This closes AI #823." The originator of the AI should be notified, and there should be an opportunity for the originator to come back and say: "No, that didn't answer the mail"—we don't need several layers of review to confirm that the message was sent.

Guideline No. 5

When an action is complete, sometimes it is the end of the story. Most closed actions do not need to be briefed to the entire Directorate, Wing, or Agency. The closure action should be well coordinated and agreed to by the AI's originator, but most of the time closing an action should be a straightforward matter of one or two individuals making a

judgment that a particular task is complete.

Guideline No. 6

Unless an action item closure plan calls for a technical briefing, technical discussion surrounding the action should be tightly controlled. After all, the action was assigned to someone to go off and act.

Guideline No. 7

Finally, use technology where you can to maximize efficiency. Microsoft Access, or a similar tool readily available to most of us, is a good way of tracking actions. These tools also make it simple to e-mail AIs as part of the coordination/closure process.

Bottom Line

All AIs are not created equal. Everyone involved in the creation, management, and closure of AIs needs to use individual judgment and avoid treating each AI the same. Track the ones that need tracking; brief the ones that need briefing; and when an action is closed—mark it closed. Handle them with care and your program office won't be overrun by resource devouring, low value-added AIs. If they do get out of hand, you can always do what Scotty did—*transport them to a Klingon ship.*

Editor's Note: The authors welcome questions or comments on this article. Contact them at ranced@nima.mil or WardD@nima.mil.

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Defense Acquisition University Alumni Association (DAUAA) President Frank Varacalli (second from right) accepts a \$2,500 sponsorship check on behalf of DAUAA from Raytheon, DAUAA's first corporate sponsor. The presentation was made during the Defense Industry Training Roundtable, held at DAU Headquarters, Fort Belvoir, Va., on Nov. 20, 2002. Presenting the check is Raytheon representative Curt Newell (second from left). Also attending the presentation were Frank Swofford (left), Defense Acquisition University Industry Chair; and Bill Bahnmaier (right), Vice President for Membership, DAUAA.

Photo by Army Sgt. Kevin Moses

