

Topic: AIF Support Series #7:
ANSI's Guide for Delegates & U.S. TAG Participation in ISO Virtual Meetings

Date: May 8, 2020

Presenters: Kristen Califra, Jason Knopes

1. Opening of the meeting

- ANSI staff provided a presentation (see AIF N367-2020) on updates to *ANSI's Guide for Delegates* and lessons learned from U.S. TAG participation in virtual ISO meetings. We want to hear from you to learn how we can best support you throughout your U.S. TAG and committee work. Submit any inquiries or comments to ANSI's ISO Team (isot@ansi.org).

2. Key points from the presentation

ANSI's Guide for Delegates:

- ANSI released an updated Guide for U.S. Delegates to ISO and IEC Meetings. The Guide was circulated to AIF members and sent to all accredited U.S. delegates to TC, SC, and PC ISO meetings. The Guide is available as a public document on [ANSI's SharePoint site](#).
- The Guide provides information to help delegates be as effective as possible when participating in ISO meetings. It describes how delegates should prepare for, participate in, and follow up after an ISO meeting, while also discussing the different actors and entities involved in ISO standards development work, and the typical stages of standard development.
- What is new in this updated version vs. the one that was previously available?
 - It is organized a differently-- the preparing, participating, and follow up from an ISO meeting is upfront.
 - There is a section on virtual meetings with tips for delegates participating virtually
 - Content is in alignment with the current version of the ISO/IEC Directives

Lessons Learned from Virtual U.S. TAG Participation: What Worked

- Virtual ISO meetings allowed for broader participation of U.S. stakeholders.
- The use of a tool such as mobile texting, WhatsApp, WebEx teams, etc., helped delegates communicate with each other during the meetings.
- Coordination before the meeting is even more necessary to ensure that the whole delegation can operate as a team.

Lessons Learned from Virtual U.S. TAG Participation: The Challenges

- Understanding expectations- Make sure delegates are comfortable asking questions to clarify expectations during the meeting.
- Networking with other delegations is limited- Prepare ahead of time to foster and call upon relationships with international colleagues.
- Reality of weeklong meetings & accommodating different time zones- Stagger meetings, and meeting times, to share time zone burdens with international delegates
- Pre-meeting coordination- ensure coordination and organization to allow for a smooth meeting.

Session Questions and Answers

1. How are others managing different time zones when scheduling meetings?

Answer: Here were some examples shared:

- We had WGs that were supposed to meet for three full days. We changed that to 5 days, 3 hours a day, and we made the intended host's timeframe the "center" of the time schedule.
- 9 am ET was agreed upon in our committee as the best balance.
- There is not one solution that makes everyone happy, it may be best to rotate times so the same group does not always have the middle of the night call

2. Given the benefits of face-to-face meetings, how does ANSI envision ISO meetings in the future?

Answer: There is no doubt that virtual meetings do not allow for the informal settings that foster consensus and compromise. Right now, safety is first and foremost. ANSI will not be making any permanent decisions on face-to-face meetings and will be monitoring the guidance from ISO. ISO was advocating for increased remote participation even before the pandemic to accommodate financial constraints of members.

3. Workers who have been furloughed can no longer work on their ISO work and it's impacting the projects they lead. Is there advice for this new reality?

Answer: Due to the pandemic, ISO has allowed committees to choose to put projects on hold for 6 months. This could be a solution if someone very involved in a project cannot participate at the moment.

4. Some companies are not allowing the use of Zoom. What have other experienced in this regard?

Answer: While Zoom is the free tool provided by ISO, it is not required. Some committees are using other solutions (WebEx, GoTo Meeting, etc.).

5. A meeting I participated in used Zoom. Do you recommend US Delegates use an alternate chat/communication tool instead of using direct/private messages in Zoom or other app?

Answer: Yes - we recommend an alternate way to communicate to keep US discussion private.

6. I was wondering if I can view past AIF meeting webinars for virtual meetings?

Answer: The slides and notes from the AIF support series are available on the ANSI ISO Forum (AIF) document library. The link to the document library can be found [here](#).

AIF Support Series #7 – ANSI's Guide for Delegates & U.S. TAG Participation in ISO Virtual Meetings

Welcome!

- We will mute all lines. Please stay muted so everyone can hear each other and the presentation.
- If your sound quality is low, try using the call back feature.
- Please disable video.
- To ask a question, please use the Q&A or Raise Your Hand features. We will closely monitor both.

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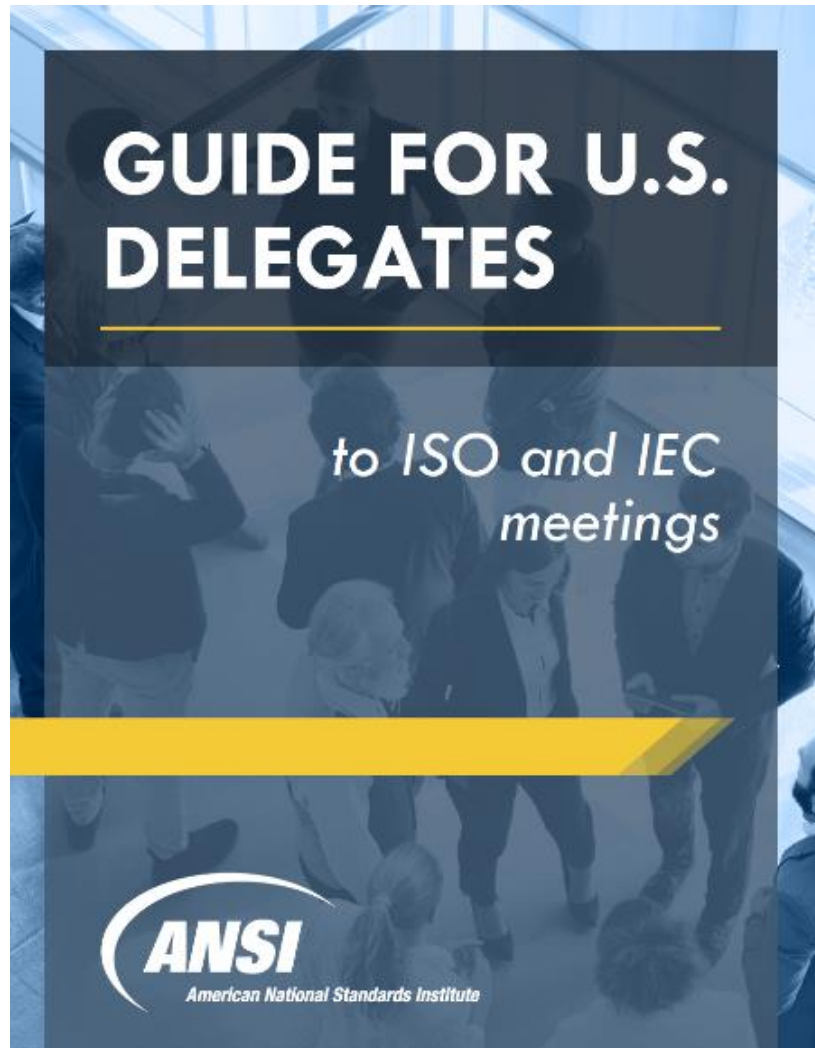
Housekeeping Items

- All participants will be muted until the end of the presentation
- Use the Q&A function to “All Panelists” / Raise Your Hand to ask questions
- If we don’t get to your question today, reach out via email isot@ansi.org
- Follow-up/repeat sessions will be held if necessary
- Slides and one-page summary to be circulated after the call
- Keep us informed of your experiences!

Session Overview

- Agenda
 - Review of ANSI's Updated Guide for Delegates
 - Lessons learned from TAG participation in ISO virtual meetings
 - Q & A/ Open Dialog
- Speakers
 - Kristen Califra, Program Manager, ANSI's ISO Team
 - Jason Knopes, Sr. Program Manager, ANSI's ISO Team

ANSI's Updated Guide for Delegates



ANSI's Guide for Delegates

- The guide is organized as follows:
 - Guidance on Participation in an ISO meeting
 - How delegates **prepare** for an ISO meeting
 - How delegates **participate** in an ISO meeting
 - Can delegates accept the position of Secretariat at a meeting?
 - Can delegates offer to host ISO meetings in the US?
 - What is expected of delegates **after** an ISO meeting
 - Additional Information and Guidance
 - Who is involved in ISO and IEC activities?
 - Information on Working Groups, Liaisons, U.S. TAGs, and more.
 - How are ISO/IEC standards developed?
 - Information on development process, other types of deliverables, etc.

ANSI's Guide for Delegates Updates

- Organized with an emphasis on meeting related material
- Section on virtual meetings and helpful IT tips for delegates
- Content updated to align with current version of ISO/IEC Directives

Lessons Learned: Things that Worked

- Broader Participation
- Tool for communication among U.S. delegates
- Extra pre-meeting coordination

Lessons Learned: Challenges

- Need to understand/communicate expectations
- Networking with other delegations is limited
- Reality of week-long virtual meetings
- Accommodating different time zones
- Pre-meeting coordination

Q&A / Open Dialogue

(please use the Q&A or Raise Your Hand functions to join the queue)

Additional Resources

- ANSI's Guide for Delegates
- ANSI's AIF support series #2 Summary
- ISO quick guide to zoom meetings: <https://iso.zoom.us/>
- ISO Code of Conduct:
<https://www.iso.org/files/live/sites/isoorg/files/store/en/PUB100397.pdf>
- ISO/IEC Directives: www.iso.org/directives
 - Part 1, Procedures for the technical work
 - Part 2, Rules for the structure and drafting of International Standards
- ANSI International Procedures:
www.ansi.org/internationalprocedures
- Additional ISOT Resources: <https://share.ansi.org/isot>

Thank you!

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