

**Topic:** AIF Support Series #2:  
*Virtual participation in ISO meetings: Tools and Strategies for US delegates*

**Date:** April 3, 2020

**Presenters:** Kemi Allston, Jason Knopes & Sara Desautels

### 1. Opening of the meeting

- ANSI staff provided a presentation on *Virtual participation in ISO meetings: Tools and Strategies for U.S. delegates*. The information provided in the presentation (see AIF 360-2020) is recommended best practices that we have gathered so far but is not an exhaustive list of solutions. Please keep us informed of your experiences. We want to hear from you to learn how we can best support you throughout your committee work. Submit any inquiries or comments to ANSI's ISO Team (isot@ansi.org).

### 2. Key point from the presentation

#### Compliance and preparation:

- The same registration and accreditation rules for participating in-person at a plenary meeting is required for virtual participation. In preparation for an ISO meeting, the U.S. TAG leadership should hold a U.S. TAG meeting to determine:
  - the U.S. TAG consensus positions on all agenda items
  - confirm the U.S. delegation and head of delegation (HoD).
  - determine how the U.S. will communicate with one another during the meeting. We recommend communication through email or group chat software, such as WhatsApp or Cisco Webex Team.
- ISO requires all ISO meeting participants to register in the ISO meeting platform. U.S. delegates have to be accredited by ANSI and registered by ANSI in order to attend the plenary meeting. U.S. TAG Administrator should send ANSI's ISO Team a completed U.S. Delegation Accreditation Form at the latest one month prior to the start of the ISO meeting.
- All ISO committee members are required to comply with the rule set forth in the [ISO Code of Conduct](#).

#### Virtual meeting Tips / Netiquette: Before and during the meeting:

- Join early, test your equipment and test your Zoom connection to make sure it is working properly.
- Speakerphones, video, and computer mics are not recommended as they tend to interfere with the quality of the call.
- When you are called on to speak, ensure that **BOTH** your phone/computer AND the Zoom mute functions are disabled.

#### Post Virtual Meeting Actions:

- Meeting participants should share their experience with the committee CM and ISO TPM through the post meeting survey.
- U.S. TAG leadership should hold a U.S. TAG call to give the U.S. delegates an opportunity to debrief the broader TAG membership on outcomes from the ISO meeting.
- The HoD will also be responsible for completing the Head of Delegation Report to be submitted to ANSI's ISO Team.

**Session Questions and Answers**

**1. Can I get an ISO Zoom account?**

**Answer:** ISO Zoom tool is available to officers within ISO – Committee Managers and Support Team, Chairs, Project Leaders, and Convenors for the advancement of ISO-related work only. Note that a Zoom account is not necessary to participate in an ISO meeting as a delegate.

**2. When the meeting date is set, will ISO be setting up the Zoom link to share with the National Member Bodies?**

**Answer:** The responsible officer hosting the call will set up the Zoom and circulate the details out to the NSBs or WG experts.

**3. What is the 'Call Me' function?**

**Answer:** 'Call Me' is one of the entry options (dial-in, **call me**, use computer audio) join the audio portion of a WebEx meeting by having WebEx call your phone with the contact number you provided.

**4. Does it call back international #? (if you are in a different country)**

**Answer:** There are local phone numbers in all countries offered for the connection, but you will need to check on the specific country options for the 'Call Me' option.

**5. Will ANSI provide a secure virtual meeting platform?**

**Answer:** ANSI does not provide virtual meeting services for US TAGs. TAG administering organizations will provide the necessary tools needed to conduct US TAG work. We encourage you to reach out to your employer to determine what options they decide to provide.

**6. Does ISO have guidelines on how to cast votes on Zoom? The presentation seems to suggest to ask HoDs to vote in "Chat Area." I noticed that Zoom has also "Thumbs up" and "Thumbs down." Can we use that for the voting record? Do the CMs need to take a screenshot of the vote or record the virtual plenary meeting for the voting record?**

**Answer:** Yes, Zoom does have a voting function. We can ask ISO to issue some practical advice on how to use that function effectively in a virtual meeting.

**7. Is this same presentation being made available to other countries?**

**Answer:** It is not clear what training other countries are providing on this same information. Some ISO TPMs are starting to provide some training to the CMs that they work with. Next week ISO will issue a guidance document that covers this same sort of information.

**8. Is there a need to file a report for working group meetings?**

**Answer:** No, there are no official reports to file after WG meetings, however, all experts are expected to communicate to the US TAG on the WG meeting results.

**9. How do you 'raise your hand' on Zoom?**

**Answer:** To raise your hand, open the participant panel and the button is next to your name.

**10. How should a roll call be taken on a remote meeting with 20 - 30 attendees? Are the recorded names from the platform adequate?**

**Answer:** We recommend the meeting host conduct the roll call by calling out each participant name and requesting that participants state their name and affiliation (National Body or organization). The meeting host should make a list of everyone on the call.

**11. Do task force leaders of a single ISO standard get a Zoom account to call meetings? If not, how do you schedule your regular TF meeting?**

**Answer:** Yes, Task Force and Ad Hoc Group leaders can request ISO Zoom accounts.

**12. Committee Managers can still use their own software? For example, we use GoTo meetings and just held some WG calls on that this past week.**

**Answer:** The TMB and ISO want to see all meetings and work proceed virtually for the time being. It has not been decided so far by TMB that committees must only use Zoom. Therefore, we believe committees can use GoTo meeting or Webex if they wish.

**13. Is there any guidance on how to best communicate with non-native English speakers? Without being in the same room, understanding can often times be missed.**

**Answer:** Communication with non-English speaking delegations can be a challenge in-person or virtually. For virtual meetings, suggest that individuals speak clearly and slowly and give additional time to confirm positions. Use of the Chat function can assist with this.

**14. Please speak to the recent ZOOM issue of being hacked and the consequences/ As per recent reports Zoom appears to have a number of issues that compromise user information.**

**Answer:** It is recommended to make Zoom meetings password protected and to ask that participants not make the link publically available. It is also suggested to only allow the host to share the screen to minimize hijacking episodes. If you are setting up a Zoom meeting and have questions, please email ISO support at [webconferencing@iso.org](mailto:webconferencing@iso.org)

You can also review the ISO quick guide to zoom meetings: <https://iso.zoom.us/>

**15. Is a dedicated USB microphone acceptable in lieu of a speakerphone?**

**Answer:** The use of a headset is preferred to eliminate the potential for disruptive background noise that can be captured on a speakerphone or external microphone. If an external microphone is the only option, we suggest you test the sound quality before a meeting and utilize the mute option during the call.

**16. How long will it be required to have ISO meetings held virtually?**

**Answer:** Currently, ISO has required all meetings to be held virtually through June 30, 2020. It is unclear at this time if that date will be extended. As soon as we are informed, we will provide additional details on further decisions made by ISO that impact the technical work and scheduling of meetings.

# Virtual Participation in ISO Meetings: Tools & Strategies for US Delegates

---

Kemi Allston, Sr. Program Administrator

Jason Knopes, Sr. Manager

Sara Desautels, Director, ISO-P Membership Services



# Session Overview

- Housekeeping
- Compliance and Preparations
- Virtual Meeting Tips / “Netiquette”: Before the meeting
- Virtual Meeting Tips / “Netiquette”: During the meeting
- Post-Virtual Meeting Actions
- Q&A / Open Dialogue



# Housekeeping for Today's Session

- All participants will be muted until the end of the presentation
- Use the Chat function to ask questions
- If we don't get to your question today, reach out via email [isot@ansi.org](mailto:isot@ansi.org)
- Follow-up/repeat sessions will be held if necessary
- One-page summary to be circulated after the call along with slides
- Information provided today is not an exhaustive list of solutions
- Keep us informed of your experiences!





# Compliance and Preparation

- With virtual meetings, compliance and preparation is still necessary
  - U.S. TAG Administrator should hold a U.S. TAG meeting to:
    - determine U.S. TAG positions on all agenda items
    - confirm U.S. delegation and appoint a Head of Delegation (HoD)
  - The U.S. TAG leadership must send ISOT a completed Delegate Accreditation form at the latest one month prior to the meeting. ISOT will complete registration on the ISO meeting platform (WG experts must register themselves directly).
  - Plan a pre-plenary delegation meeting to:
    - confirm US TAG consensus positions
    - determine how the US will communicate during the meeting
    - review remote participation guidelines
  - All ISO committee members are required to comply with rules set forth in the [ISO code of conduct](#).
  - The Head of Delegation (HoD) speaks for the entire U.S. delegation
    - Introduction of US delegates and stating US positions
    - When appropriate, the HoD may designate another delegate as the speaker on a particular topic or point
  - HoD report to be submitted to ISOT after the meeting.

# Virtual meeting Tips / Netiquette: Before the meeting

- **Communication Plan**- Identify how US delegates will connect with each other during the meeting . Use electronic team collaboration tools such as email or group chat software (i.e., WhatsApp, Cisco Webex Team), to communicate with one another during the meeting.
- **Coordination** - Consider issues ahead of time that may require coordination with other NSBs.
- **Using Zoom** - Be familiar with the Zoom tool prior to the meeting. (*ISO Zoom account is not required*)
- **Quiet location** - Carefully choose where you will take part in the virtual meeting to avoid distractions such as pets and children.
- **Login in Early/ Sign in**- Test your equipment and Zoom connection to make sure it is working properly. Sign in with full name (NSB) and identify if you are the HOD (example: John Doe (ANSI) or Jane Doe (ANSI) - HOD).
- **Do NOT use a speakerphone** - They interfere with the quality of the call. If you are a group participating in the conference, it might make sense. But if it is just you, please don't use a speakerphone.
- **Do NOT use video** - Turn this function off to maximize bandwidth.
- **Go hands-free** - Consider using a headset or earphones.
- **Eliminate background Noise** - Turn off TV, background music, etc.





# Virtual meeting Tips / Netiquette: During the meeting

- **Login in Early** - Joining late can be disruptive to the meeting. If you are late to the call, do not jump in and announce yourself. Use the chat, wait for the meeting manager to recognize you, or wait for a break.
- **Use 'Call Back' function** - this will eliminate poor sound quality
- **Mute yourself**- Use the mute button when you are not speaking.
  - Note: meeting host is encouraged to mute everyone upon their entry into the meeting.
- **Unmuting** - When you are called on to speak, ensure that BOTH your phone/computer AND the Zoom mute functions are disabled.
  - Tip: when you are muted on the computer, you can hold the space bar while speaking to be heard, and release the space bar to go back to being muted.
- **Use the Chat / Raise Hand Feature** - to respond to something or indicate you have something to say. Please wait until you are called on.
- **Access issues** - If you have technology problems or need call details, email or text someone you know is on the call OTHER THAN the committee manager or convenor. They are likely involved with getting the call started and are not checking emails, text messages, etc.



# Virtual meeting Netiquette/Tips: During the meeting for HoD

- **HoD role** - The HoD speaks for the entire U.S. delegation, introduces US delegates and states US positions. When appropriate, the HoD may designate another delegate as the speaker on a particular topic or point.
- **Identify yourself** - When speaking, start by identifying your affiliation (National Body or organization) and your name.
- **When speaking** - Speak when recognized, be brief, clear and speak slowly.
- **Voting / commenting** - When voting/commenting, use the chat function on the electronic meeting tool to indicate:
  - The National Body or liaison organization you represent.
  - Your voting position, e.g. “ANSI: yes” or “ANSI: no” to ensure that the votes are correctly counted by the committee leadership.
- **Using Chat Function** - It is preferred that only the Heads of Delegation in a committee meeting use the chat function if there are many participants, to ensure the Committee Manager has enough control over discussion flow.
- **Connect with delegates** - Consider holding debrief meetings during or after the meeting breaks to discuss the U.S. positions.

# Post Virtual Meeting Actions

- Provide Feedback - Share your experience with your CM and ISO TPM through the post-meeting survey.
- Submit Report - Submit HoD report to ISOT.
- Communicate with TAG - Report out to the US TAG the outcomes and US delegates observations on the ISO plenary meeting on items such as:
  - Approved committee resolutions;
  - Communicate key target dates;
  - Communicate calls for experts/participation;
  - Discuss any items where US positions were not accepted and strategize on next steps.
- Communicate with ANSI - Reach out to ANSI any concerns with the meeting outcome



# Q&A / Open Dialogue

(please use the Chat function to join the queue)



# Additional Resources

- 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](http://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](http://www.ansi.org/internationalprocedures)
- ISO templates and forms: [www.iso.org/templates](http://www.iso.org/templates) & [www.iso.org/forms](http://www.iso.org/forms)
- ISOT provides U.S. TAG Chairpersons and Administrators with access to their corresponding ISO Committee documents. Be sure to use these and share relevant documents with the other U.S. TAG members
- Additional free ANSI eLearning courses: [www.standardslearn.org](http://www.standardslearn.org)
- Additional ISOT Resources: <https://share.ansi.org/isot>
- ANSI Guide for U.S. Delegates, Delegate Accreditation Form, Head of Delegation (HoD) Report, Workflows for ANSI Accredited TAG Administrators





For More Information

**ANSI's ISO Team**

[isot@ansi.org](mailto:isot@ansi.org)

**American National Standards Institute**

**Headquarters**

1899 L Street, NW

11th Floor

Washington, DC 20036

T: 202.293.8020

F: 202.293.9287

**New York Office**

25 West 43rd Street

4th Floor

New York, NY 10036

T: 212.642.4900

F: 212.398.0023

[www.ansi.org](http://www.ansi.org)

[webstore.ansi.org](http://webstore.ansi.org)

