

**Topic:** AIF Support Series #13: *Working Group Convenor Training*

**Date:** October 6, 2020

**Presenters:** Jason Knopes (ANSI Staff), Sally Seitz (ANSI Staff) and Ed Terhune (ANSI Staff)

### 1. Opening of the meeting

- A presentation (see AIF N407-2020) was given on Working Group Convenor Training. The presentation provides an overview of the roles and responsibilities of ISO Working Group Convenors.
- 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

#### Role of the Convenor:

- Serves as the “Chair” of the Working Group by leading and coordinating WG meetings, leading the WG towards consensus and moving assigned projects through the stages of development to completion.
- Co-Convenors are only possible in twinning relationships or Joint Working Groups.

#### Convenor Appointment:

- Convenors are nominated by a P-member or Category A Liaisons of the parent committee. This usually happens during the initial establishment of the committee and the Convenor usually comes from the NSB proposing the committee.
- The nomination is sent to the Committee Manager of the parent committee who circulates nomination to the TC or SC for approval via resolution or committee internal ballot.

#### Term of Office:

- Convenors are nominated for an initial three-year term but may be reappointed for additional terms with no limit on how many terms a Convenor may serve.

#### Responsibilities of Working Group Convenors:

- Organize and chair WG meetings, either in person or virtually. Convenors should keep be aware of the current ISO rules on convening meetings during COVID-19. The most up to date information is available on [ISO Connect](#). All meeting announcements, agendas and documents are to be provided in advance of the meeting in accordance with the ISO Directives, Part 1.
- Always act in a neutral and purely international capacity void of any national, personal, organizational or corporate bias. Convenors, like TC and SC Chairs and Committee Managers, are also required to act in accordance with the ISO Code of Conduct.
- Ensure that all projects assigned to the Working Group progress in a timely manner and ensure that the decisions made by the Working Group are consensus based. If there are projects that are not progressing or will be delayed, the parent TC or SC Chair and Committee manager should be notified immediately. Convenors are also expected to regularly update the parent TC or SC on the status of the Working Group.

- Convenors judge, in consultation with the Project Leader and Working Group Experts when a working draft is ready for submission to the parent TC or SC for consideration. Working Group Convenors are also responsible for providing a proposed disposition of comments on every comment submitted on a working or committee draft.
- Distribute all working group documents via the ISO Document management platform. Convenors have the ability to post documents and conduct consultations via the platform.
- Convenors need to have a working knowledge of the ISO procedures and applications:
  1. [Current Edition of the ISO/IEC Directives, Part 1](#)
  2. [Current Edition of the ISO/IEC Directives, Part 2](#)
  3. [ISO Online Browsing Platform](#)
  4. [ISO Web Based Applications](#) including the ISO Document management system, meeting platform and WG consultation tool.
  5. [ISO Commenting Template](#)
  6. [ISO Forms](#)
  7. [ISO MS Word Template](#)

### **Session Questions and Answers**

#### **1. Do Convenors have access to a free Zoom account?**

**Answer:** Yes, Convenors do have access to a free Zoom account provided by ISO. Please contact [webconferencing@iso.org](mailto:webconferencing@iso.org) and note your ISO role to get your complimentary access. Please note that Zoom is not a required tool for virtual meetings. Convenors are allowed to use any web-based meeting tool that they wish.

#### **2. Is meeting attendance controlled by name of each member body?**

**Answer:** Experts in a working group represent themselves, not their national member body. Only registered experts in a working group may attend meetings.

#### **3. In Joint Working Groups, are both convenors responsible for distributing documents to its members?**

**Answer:** Yes, each convenor is responsible for circulating pertinent information to its parent TC or SC. The convenors can decide who is responsible for distributing working group documents to its experts.

#### **4. Does the IEC Have a meeting platform as well?**

**Answer:** Yes, the IEC has a meeting portal but it is different from the ISO meeting portal.

#### **5. What is the policy about making published standards for WG standard-development work? Are WG members required to purchase personal copies for this purpose?**

**Answer:** The ISO Team provides a complimentary copy of standards published by ISO TCs and SCs to the TAG Administrator of the committee responsible to the publication of the standard. If a working group requires a standard published by another TC or SC, the U.S. Convenor or the related U.S. TAG Administrator can make a request to the ISO Team ([isot@ansi.org](mailto:isot@ansi.org)) for a complimentary copy of the standard.

#### **6. Who has access to the Project Portal?**

**Answer:** ISO Chairs, Committee Managers, and Convenors have access to the ISO Project Portal.

**7. What resources are available related to developing graphics for ISO deliverables?**

**Answer:** ISO provides [guidelines](#) on their [Resources for Drafting Standards](#) page which outlines the requirements for any files that are to be submitted to ISO/CS. The ISO Project Portal will contain the graphics files for most published documents which can be used for any subsequent revisions. Convenors and Project Leaders should feel free to reach out to their TPM/editor for advice on graphics as they're being developed and to their working group members should they need help with drafting or formatting.

# Working Group Convenor Training

---

Jason Knopes, Sr. Program Manager

Sally Seitz, Sr. Program Manager

Ed Terhune, Program Manager





# 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!



# Session Overview

## Role

- What's the position?
- How is he/she appointed?
- What are the terms of office?

## Responsibilities

- What do I do?
- What's the bottom line

## Resources

- What's in my toolbox?
- Who can I go to for help?

## Wrap-up and Q&A

# Role – What's the position

- Leads a Working Group
  - Can function as project leader
  - Co-Convenors only in Twinning or Joint Working Group
- Functions as a driving force behind the progression of a project
  - Plays a key role in developing the standard in a timely fashion
  - Strives to bring the Working Group experts to consensus
- Shall act in a neutral and purely international capacity and in accordance with ISO's Codes of Conduct

# Role – How is he/she appointed?

- Nominated by his/her National Body, normally during the establishment of the Working Group
  - National Body must be a P-member of the TC or SC to which the Working Group will be assigned
  - Usually from the National Body proposing the Working Group
  - Can also be nominated by a Category A liaison organization
- Appointed by the parent TC or SC and accountable to the WG and the parent TC or SC



# Responsibilities – What do I do?

- Organize and chair WG meetings
- Act in a neutral and purely international capacity and in accordance with ISO's Codes of Conduct
- Drive the Working Group experts to consensus
- Distribute relevant WG/committee documents via the ISO document management platform
- Manage assigned projects according to timelines
  - Report problems to parent TC or SC Committee Manager
  - Report regularly to the parent TC or SC on work of Working Group

# Responsibilities – What do I do

- Judge, along with the Project Leader and Working Group experts, when a Working Draft is ready for submission to parent TC or SC for consideration as 1st Committee Draft
- Have a working knowledge of the procedures and applications
  - Follow the current edition of the ISO/IEC Directives, Part 1
  - Follow the current edition of the ISO/IEC Directives Part 2
  - Know MS Word for drafting standards
  - Know ISO web based applications
- Monitor where the experts are coming from

# Responsibilities – bottom line?

- Organize and chair WG meetings
- Always acts in a neutral and purely international capacity without National Body, company, organization, or personal bias
- Follow ISO's Codes of Conduct
  - <https://www.iso.org/publication/PUB100397.html>
- Drive the Working Group experts to consensus
- Ensure the timely and orderly production and progression of assigned projects by monitoring and meeting ALL deadlines.

# What's in My Toolbox?



Current edition of  
ISO/IEC Directives,  
Part 1

ISO website page on  
drafting standards

↳ ISO/IEC template

ISO project portal

Current edition of  
ISO/IEC Directives,  
Part 2

↳ ISO brochure on  
How to Write  
Standards

# Q&A



# If I Need Assistance, I can Contact...

- **Committee Manager or Chair of parent TC or SC**
- **ISO helpdesk**
  - [Helpdesk@iso.org](mailto:Helpdesk@iso.org)
- **ANSI ISO Team**
  - [isot@ansi.org](mailto:isot@ansi.org)



# *GUIDANCE DOCUMENTS*

- [ISO/IEC Directives, Part 1](#)
- [ISO/IEC Directives, Part 2](#)
- [My ISO Job](#)
- [ISO Drafting Template](#)
- [ISO Zoom Account Eligibility](#)
- [How to Write Standards](#)
- [COVID-19 Temporary Measures](#)

# 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)

