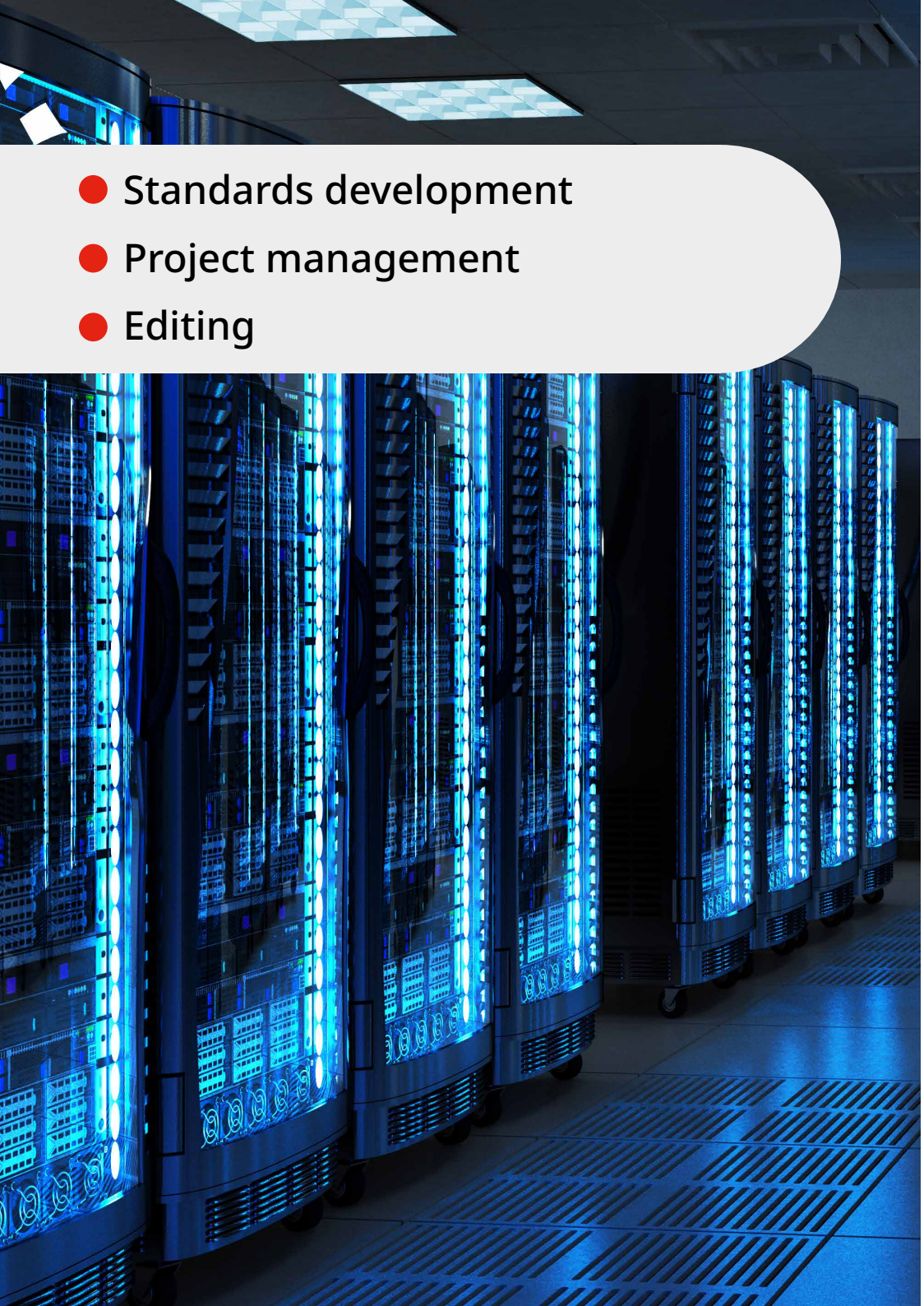
Drafting a British Standard

Working with your editorial project manager

bsi.



- Standards development
- Project management
- Editing

Contents

1 Introduction **4**

2 Benefits of involvement in standards **5**

3 Your editorial project manager **6**

4 Panel roles and responsibilities **8**

4.1 Panel members 8

4.2 The panel convenor 9

5 Drafting meetings **10**

5.1 Frequency of meetings 10

5.2 Location and times 10

5.3 Participation in meetings 11

5.4 Agenda, minutes and actions 11

6 Overview of the development process **12**

7 Drafting rules **14**

7.1 Audience 14

7.2 Types of standard 15

7.3 Provisions 16

7.4 Verbal forms 17

7.5 References to legislation 18

7.6 References to third-party certification 19

7.7 Spellings 19

7.8 Differences between British and European drafting rules 19

8 Options for updating standards **20**

9 Drafting process **21**

9.1 BSI Documents 21

9.2 Electronic drafting 21

10 Useful links **22**

1 Introduction

Some years ago, a BSI committee chair listed the principles that would inform the drafting of a new British Standard.

- I want to produce the best possible standard
- I do not want anyone on the panel to be unhappy with the standard
- I do not want to spend any longer on this project than is strictly necessary

While these principles might seem a little blunt, they are entirely consistent with the assumptions of BSI that:

- A standard needs to be authoritative, practical, of value to the community for which it is intended and of benefit to the wider community
- A standard needs to be based on consensus: everyone involved should feel that their concerns are considered during drafting
- Those involved in the drafting do so in their own time, but commit to taking an active part in developing a standard and keeping to carefully planned schedules
- Participation should not be an ordeal; the effort should be shared equally

To facilitate the process and allow panel members to focus on agreeing the technical content, BSI assigns to each project an editorial project manager (EPM) to undertake the editorial and project management responsibilities.

2 Benefits of involvement in standards

Panel members benefit from helping to develop standards.

As a panel member, you can:

- Gain a better insight into why a standard has been developed
- Have the opportunity to shape the development of a standard
- Gain a greater understanding of sector and industry trends, both nationally and internationally
- Keep abreast of the latest technical innovations in your field
- Gain a sense of achievement from knowing that you've made things better
- Network and share expertise with fellow experts from industry and business in a neutral environment
- Gain unique access into the standards development process
- Learn new skills which could help in your current job and career development
- Access free training courses through BSI Committee Member Training (see www.bsigroup.com/cmtraining), which covers a range of subjects including:
  - guidance for new committee members
  - the drafting of standards
  - British Standards and the law
  - taking the chair in standardization
  - creative and innovative problem solving
  - cultural awareness and inclusivity
  - networking and personal impact

More information on the benefits of membership can be found at: https://www.bsigroup.com/en-GB/about-bsi/uk-national-standards-body/how-to-get-involved-with-standards/)[1].

[1] This and other URLs given in this document are current at time of publication. Section **10** contains links to the various documents, tools and sites referenced throughout this document.

3 Your editorial project manager

The editorial project manager (EPM) is a specialist in the drafting and development of British Standards of UK origin.

Although the EPM is not a technical expert, they have expertise in creating standards from existing text and helping panels to develop new text that meets all the criteria of BS 0 (see **7.1**) and the *Rules for the structure and drafting of UK standards* (abbreviated in this document to *Rules*). BS 0 gives the principles of standardization; the *Rules* (which are based on the ISO/IEC Directives, Part 2) give the format, structure and drafting rules for all standards of UK origin published by BSI. Presentation and house style are covered in the *Style guide for UK standards – Presentation, typography and standard wording* (abbreviated in this document to *Style guide*).

The EPM works with the drafting panel to guide the document from inception to publication, within the timescale agreed by the panel, EPM and committee manager (CM) at the start of the project, typically during the kick-off meeting.

The responsibilities of the EPM are to:

- Manage the project through the key stages of the development process (see **6**)
- Support the panel convenor and CM in managing the panel
- Agree schedules with the panel at the beginning of the project and work with the panel throughout the project to publish on schedule
- Arrange and attend drafting meetings, as necessary, providing editorial input (the EPM might not need to be present during all meetings)
- Edit and style the draft in accordance with BS 0, the *Rules* and the *Style guide*
- Offer relevant guidance and advice at any point in the panel's deliberations, and intervene in such deliberations if it becomes apparent that they are likely to lead to decisions that are unlawful, illegal or potentially injurious to BSI's reputation
- Liaise with the CM, keeping them informed of progress and obtaining their input as necessary
- Arrange for drawings to be prepared by the BSI Drawing Office
- Coordinate the resolution of technical and editorial queries
- Circulate all relevant documentation
- Keep relevant stakeholders informed of progress with the draft
- Request committee approval for public consultation and publication

In performing their role, the EPM might have to give advice that is not entirely welcome. In such cases, the EPM will work closely with the panel to find a solution that is acceptable to both BSI and the panel.

The EPM is only responsible for the management of the project. If you have a query regarding the composition of a committee/panel or its membership, or any questions regarding committee activities, please speak with the CM.

4 Panel roles and responsibilities

4.1 Panel members

The success of a project relies on the commitment and technical expertise of panel members. By joining a drafting panel, members are agreeing to abide by the drafting protocols, specifically to:

- Understand and adhere to BS 0 and BSI procedures (see **7**)
- Understand the key stages of the development process (see **6**)
- Understand and adhere to the *Rules* and *Style guide* for national standards
- Obtain appropriate consent to reproduce third-party IPR, if there is an exceptional circumstance necessitating inclusion of such material
- Use the information technology tools that are made available
- Commit to publishing the standard on schedule
- Actively participate throughout the development process, take on actions, and meet agreed deadlines
- Provide relevant technical input, attending meetings where necessary and complete work between meetings
- Review all drafts and comments carefully, prior to meetings, and raise queries or objections within agreed timescales
- Actively promote Drafts for Public Comment (DPCs) to interested parties and encourage these parties to submit comments on time using the correct procedure

4.2 The panel convenor

The panel convenor is usually expected to chair panel meetings. Effective chairing can make a great difference to the efficiency and effectiveness of the development process. In addition to the responsibilities in **4.1**, the panel convenor is expected to:

- Act to attain consensus throughout the drafting process
- Work closely with the EPM to ensure that drafting progresses on schedule and that any difficulties are resolved quickly
- Liaise with the EPM to determine a meeting venue or online platform that will be acceptable to all attendees
- Run meetings effectively to ensure that discussions are succinct and focused, and be decisive, where necessary
- Safeguard the impartiality and integrity of the development process
- Delegate actions
- Encourage all members to complete work within agreed timescales to ensure that the project is published on schedule
- Alert BSI to any perceived imbalance in the composition of the panel, or under-representation of important interests or expertise
- Agree/provide a list of agenda items to cover at each panel meeting
- Provide progress reports and updates to the responsible technical committee, committee manager and EPM, when requested, in a timely manner

5 Drafting meetings

5.1 Frequency of meetings

Drafting meetings are held as often as is deemed necessary to meet the agreed schedule. Fewer meetings are likely to be needed if actions allocated to panel members are completed in a timely manner in between meetings.

Between drafting meetings, panel members are expected to complete actions and work on the draft to ensure that projects progress in line with the agreed schedule and actions. Persistent slippages of the schedule could result in cancellation of the project.

5.2 Location and times

Meetings include those held online, by conference call, face-to-face, and any combination thereof. Online meetings are preferred, and face-to-face meetings are expected to include a hybrid option.

There are a number of potential platforms for online meetings, but BSI tends to use MS Teams. When virtual meetings are to be held, it is your responsibility to ensure that you have sufficient bandwidth to use the agreed platform.

Physical meetings, where required, are typically held at BSI's offices in London, which are located at 389 Chiswick High Road, above Gunnersbury Station.

Not all drafting work will be conducted during meetings. Much will be performed between meetings, via email correspondence.

Start and finish times vary depending on members' availability and are agreed between EPM and panel.

5.3 Participation in meetings

If meetings are deemed necessary, it is essential that panel members participate as frequently as possible so that drafting is not delayed. If panel members consistently fail to participate in meetings or to complete actions assigned to them, they might be asked to leave the panel.

There is no quorum for panels, so a meeting could go ahead with two panel members if it would help to progress the work.

The EPM usually coordinates drafting meetings unless otherwise agreed. They participate in meetings when required, to advise the panel on editorial and drafting issues.

The EPM might not participate in a meeting where:

- Technical discussions are the only focus of the meeting
- Actions have not been submitted as previously agreed
- The panel members are happy to progress the content of the draft by themselves

During a meeting, the EPM can update the draft and project the changes on a screen, although this is not their primary function in attending.

5.4 Agenda, minutes and actions

The EPM notifies the panel of forthcoming meetings, with an agenda and appropriate joining details.

Minutes are not produced for panel meetings, as the draft and/or annotated comments are considered to be a record of the decisions made during the meeting. However, any action points are circulated following the meeting; these might be noted in the draft or annotated comments, or supplied as a separate list. For drafting to progress on schedule, it is important that all actions are carried out by the agreed deadlines.

6 Overview of the development process

1. Proposal

A proposal for new work is submitted to BSI. Proposals are usually generated by the committee and are often the result of the five-year review.

2. Planning and approval

A business case is prepared by the committee manager with guidance from the committee. This is submitted to the BSI Planning and Approval team for consideration.

If the project is accepted, a drafting panel is identified and the panel members are issued with a Project Overview.

Committee manager + committee:

- Prepare business case for new project
- Set up the panel

Panel:

- Commits to undertaking the work and completing it within the agreed timescales

3. Allocation and kick-off

Once the panel has been set up, the project is assigned to an EPM.

EPM:

- Contacts panel to arrange a kick-off meeting
- Attends kick-off meeting and works with panel and committee manager to agree a project schedule

Panel + committee manager:

- Attend the kick-off meeting
- Agree a schedule
- Agree initial actions and deadlines

4. Drafting

Drafting is normally carried out by a panel of experts, typically consisting of five or six members, together with the EPM. Several versions of the draft might be produced before it is finalized.

Panel:

- Writes draft, employing technical expertise and liaising with each other as necessary
- Attends meetings and completes work between meetings
- Meets the agreed target date for public consultation

EPM:

- Assists panel by providing editorial input and BS 0 expertise
- Circulates updated drafts
- Coordinates meetings
- Arranges for any drawings to be prepared by the BSI Drawing Office

5. Approval for public comment

The draft is circulated to the panel and its parent committee(s) for approval (generally two weeks each).

It is common at this stage for panel and committee members to be asked to reserve all further comments for the DPC, unless there are technical errors that need to be corrected before it can be issued.

EPM:

- Prepares and circulates draft
- Makes arrangements for Draft for Public Comment (DPC) to be announced in "Update Standards"

Panel + committee(s):

- Review draft and approve for public comment

6. Public consultation

The two-month public comment period enables a broader audience to view the draft, ensuring transparency and acceptability of the resulting standard.

Comments on all drafts can be made, by any interested party , through the online Standards Development Portal (see standardsdevelopment.bsigroup.com).

EPM:

- Circulates draft to interested committees as identified by the panel and/or committee manager
- Acts as primary contact for comment submission

Panel + committee(s):

- Forward draft to nominating organizations and advise external contacts
- Submit any outstanding technical comments

7. Comment resolution

The comments received during the public comment period are considered by the panel, with input from the EPM, and the draft is amended in line with the decisions taken.

EPM:

- Collates and circulates comments
- Advises on editorial and BS 0 issues
- Updates draft to reflect decisions made
- Circulates list of decisions made

Panel:

- Reviews all comments
- Agrees actions to be taken and completes actions within agreed timescales

Past this point no technical changes can be made, other than the correction of technical errors.

8. Final approval

A final draft is prepared by the EPM, which is then circulated to the panel and its parent committee(s) for a two-week approval period.

Consensus needs to be achieved by the relevant parent committee(s) before the standard can be published.

EPM:

- Prepares and circulates final draft

Panel + committee(s):

- Review draft and approve for publication

9. Endorsement to publish

The committee manager and chair of the relevant subcommittee and/or technical committee endorse the draft for publication.

After this, there is generally no further involvement from the panel or committee(s) prior to publication.

Committee manager + chair:

- Sign draft off for publication

10. Typesetting and publication

The EPM makes arrangements for typesetting and publication.

The standard is published and details are made available on the BSI website and through "Update Standards".
A complimentary copy is made available to the panel and committee(s).

EPM:

- Prepares document for publication
- Checks and approves proofs of typeset documents
- Arranges onward processing

7 Drafting rules

All British Standards of UK origin are written in accordance with the *Rules*, the aim of which is to ensure that standards are clear, consistent and usable.

The EPM is involved in the drafting process to help the panel understand and implement the drafting rules. Some of the more common issues and queries are outlined in this section.

7.1 Audience

The audience of a British Standard is identified in the business case before drafting begins. The standard then has to be written so that its provisions are ones that the intended user is able to carry out.

For example, where a specification addresses the manufacturer of a product, it cannot specify requirements for the purchaser of the product as the purchaser will not be able to satisfy the manufacturing requirements.

Overview of BS 0

BS 0 gives the principles of standardization and outlines the role of BSI, as the UK national standards body, and that of its committee/panel members in the preparation of standards (of national, European and international origin).

It covers topics including the key stages of the development process (see also **6**); committee composition, roles and responsibilities; and content and drafting of standards, including intellectual property.

The issue of consensus is also addressed, and this is a key part of drafting as committees and subcommittees need to reach consensus before a standard can be published. For BSI's purposes, consensus is defined as: "general agreement, characterized by the absence of sustained opposition to substantial issues by any important part of the concerned interests and by a process that involves seeking to take into account the views of all parties concerned and to reconcile any conflicting arguments". Consensus does not imply unanimity. A process is in place to address sustained opposition.

7.2 Types of standard

The following are the most common types of standard produced by panels, with the assistance of EPMs.

Specification

A specification specifies requirements that have to be met, usually by a product or a material, in order for conformity to be claimed. Every requirement has to be drafted in such a way that conformity to it can be verified objectively. This usually means that there has to be a method for testing conformity (typically provided in an annex or by reference to a separate standard or other document).

Code of practice

A code of practice gives recommendations, and supporting guidance, on good practice, usually for one or more processes or procedures, e.g. the installation of a system. A code of practice cannot specify requirements. The recommendations should be as unambiguous as possible.

Claims of compliance can be made to a code of practice, and processes and services certified against it.

Method of test

A test method provides repeatable and reproducible procedures with consistent outcomes for the assessment of material, product or process performance.

A test method can only give the procedure itself. While it can give pass/fail criteria, it cannot specify what the outcome of a test or measurement is to be. This has to be given in the specification for the material, product, etc., to which the test or measurement is to be applied.

Guide

A guide primarily contains information and guidance, although it can also contain recommendations where appropriate. A guide cannot specify requirements.

A guide does not support claims of compliance or certification.

7.3 Provisions

The text of a British Standard should set out clear and unambiguous provisions with a limited amount of supporting information.

Provisions describe what the user of the standard or their product has to do in order to be able to claim compliance with the standard. For this reason, a standard has to be drafted in such a way that the user can readily identify and understand the provisions.

Normative vs. informative

Provisions are known as the "normative" element of the text as indicated by the appropriate verb shown in the table below).

The "informative" element comprises any guidance on, or background to, the provisions.

The provisions have to:

- Be consistent, accurate and within the control of the user (see **7.1**)
- Be technically robust, practicable and achievable
- Focus on performance rather than design
- Be comprehensible to competent people

Provisions come in different forms depending on the type of standard.

Type of standard	Provisions	Examples
Specification	Requirements	"When tested as described in Annex A, the product shall…"
Code of practice	Recommendations	"The product should be installed in accordance with…"
Method of test	Instructions	"Condition the sample for 2 h at a temperature of 65 °C."
Guide	Does not contain provisions but may give recommendations	"The plan should aim to set out a step-by-step process to be followed."

7.4 Verbal forms

The following verbs are used. (The imperative may also be used within test methods.)

Verb	Implication	Typical context
shall	Requirement	Normative element of a specification
should	Recommendation	Normative element of a code of practice Informative element of a specification
may	Permission (within the stated limits of the standard to adopt a particular course of action)	Informative element of any standard
might/could	Possibility	Informative element of any standard
can	Capability	Informative element of any standard
is	Description	Informative element of any standard

The following verbs should be avoided.

Verb	Notes
must	Use is explicitly prohibited by the *Rules*, to avoid confusion with external statutory obligations
will	Should be avoided as it can be ambiguous and standards cannot predict the future

7.5 References to legislation

A standard cannot specify or recommend compliance with the law or the discharge of legal obligations.

Standards are not legal documents and compliance with them is almost always voluntary, whereas compliance with legislation is not voluntary. Users of standards are expected to obey the law, whether or not they choose to comply with a standard.

It is generally inadvisable to make reference in a standard to legislation. The panel should certainly resist any temptation to try to produce lengthy lists of relevant legislation.

There is a risk that any such list might be thought by the user to be definitive and exhaustive; it almost certainly will not be. Even if it were correct at the point of publication, it would quickly become out of date.

Standards should be drafted as being complementary to regulation, offering routes for demonstrating compliance, good practice or due care.

> No attempt should be made within a British Standard to offer explanation, interpretation or justification in respect of any regulatory measure. Any reference should be restricted to drawing attention to applicable regulations.

The panel should also bear in mind that, in some instances, there are three or more sets of regulations in force within the UK.

Where references to legislation are deemed essential, they need to be presented informatively and are generally phrased in the following form: “Attention is drawn to the Gas Safety (Installation and Use) Regulations 1998...”.

7.6 References to third-party certification

A standard cannot stipulate third-party certification of conformity. This reflects the principle in the UK that certification should be a voluntary option.

If third-party certification or independent assessment is considered by the panel to be desirable, standard wording to that effect may be included in the Foreword.

7.7 Spellings

Spelling conventions are taken from the *Shorter Oxford English Dictionary*. The dictionary prioritizes the use of “z” as opposed to “s”, e.g. in “energize” or “organization”. This is the traditional UK spelling rather than an Americanization.

The “f” spelling of the word “sulfur” and its derivatives is taken from the agreed variant adopted by the International Union of Pure and Applied Chemistry (IUPAC).

7.8 Differences between British and European drafting rules

Although the CEN drafting rules, like the BSI *Rules*, are based on the ISO/IEC Directives (see **3**), the BSI *Rules* include some features that are unique to UK national standards. Therefore, a purely national standard has to be edited in accordance with the BSI *Rules*; text cannot necessarily be copied verbatim from a European or international standard as the basis of a British Standard.

8 Options for updating standards

Standards can be updated as full revisions, new editions or amendments.

- For full revisions, the text is completely reviewed from an editorial as well as a technical viewpoint and is brought into line with the most recent edition of the *Rules*. Revisions take a new publication date.

  In editing a full revision, it cannot be assumed that wording will be acceptable simply because it was in the previous edition, and precedent alone is not sufficient justification for retaining content that no longer meets the drafting rules.

- Amendments retain the original publication date, with an amendment date added. Only new or changed text is edited and issued for public comment. Additions, changes and deletions are marked with amendment tags.
- New editions fall between revisions and amendments. New editions can be used where many changes are introduced that affect a large proportion of the content, thus making an amendment unsuitable, but a full revision is not considered practicable. As with amendments, only new or changed text is edited and issued for public comment. However, unlike amendments, there are no amendment tags or other marks to indicate additions, changes or deletions. New editions take a new publication date.
- Corrigenda are used to correct one or more errors or ambiguities inadvertently introduced in either drafting or production that could lead to incorrect or unsafe application of the standard. Additions, changes and deletions are marked with corrigendum tags. There is no change to the publication date, but a reference to the corrigendum is included in the identifier.

9 Drafting process

9.1 BSI Documents

BSI uses a web-based system, BSI Documents, that provides a working environment for the panel. The system allows panel members to access documents and email discussion forums. It also archives all emails sent through the system, thereby providing an audit trail of correspondence relating to the panel or project and enabling new panel members to see previous discussions.

A username and password are sent to all panel members on joining the panel.

It is essential that you log in to the system as soon as you receive your username and password. If you do not log in, you will not receive important documentation and communications relating to the project (see https://login.iso.org/portal/). It is your responsibility to keep your contact details up to date (via the committee manager).

The BSI Documents support team can provide assistance for any system issues, e.g. forgotten log-in details, at BSIdocuments.support@bsigroup.com

9.2 Electronic drafting

Drafting is undertaken in Microsoft Word, using a BSI template. Regardless of which operating system you use, you need to have the ability to view and edit Microsoft Word documents (.docx).

At the beginning of drafting, the EPM will discuss with the panel how best to manage the draft and comments. The following points should be noted:

- There is a master version of each draft of which control is vital as it allows the development of the draft to be traced, and this is managed by the EPM
- All changes made by either the EPM or panel members need to be tracked using the “Track Changes” function, unless otherwise agreed

10 Useful links

The following websites will be of use during drafting.

BSI
http://www.bsigroup.com

BS 0 and Rules for the structure and drafting of UK standards
https://www.bsigroup.com/en-GB/standards/Information-about-standards/how-are-standards-made/The-BSI-Guide-to-Standardization/

BSOL (British Standards Online)
http://bsol.bsigroup.com

Standards Development Portal
https://standardsdevelopment.bsigroup.com/

Update Standards
https://shop.bsigroup.com/pages/update-standards-magazine

ISO Online Browsing Platform
https://www.iso.org/obp/ui/

New Proposals
https://standardsdevelopment.bsigroup.com/Proposals

BSI Documents
https://login.iso.org/portal/

Committee member training
http://www.bsigroup.com/cmtraining

BSI Group Headquarters
389 Chiswick High Road
London W4 4AL
bsigroup.com

© BSI Standards Limited 2023