



Drafting a British Standard

Working with your content developer

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Introduction

In 2006, a BSI committee chairman listed the principles that would inform the drafting of a new British Standard (paraphrased below).

- 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 of a sufficiently high quality that it will be widely adopted and used by the community for which it is intended;
- a standard needs to be based on consensus: everyone involved should feel that their concerns are considered during drafting;
- those involved in the drafting are doing so in their own time, so each project should be carefully scheduled and planned to ensure that they do not have to commit a large amount of their time to drafting.

To help reduce the burden and allow panel/committee members to focus on agreeing the technical content, BSI allocates to each project a content developer who carries out many of the administrative, editorial and project management responsibilities.

Roles and responsibilities

The content developer

BSI employs a team of content developers who are specialists in managing the process of developing a British Standard.

Content developers are not experts in the subject matter of each British Standard. Their expertise and experience lies in the ability to create documents from existing text that meet all the criteria of BS 0, the British Standard for writing standards. BS 0-2 specifies the format, structure, drafting rules and house style for all standardization documents written by BSI.

A content developer will work with each drafting panel/committee to guide the document through from inception to publication, within an agreed timescale.

The responsibilities of the content developer are to:

- manage the project through the key stages of the development process (see page 4);
- agree a schedule with the panel/committee at the beginning of the project;
- arrange and attend drafting meetings, as necessary, providing editorial input;
- edit the draft in accordance with BS 0-2 and house style;
- arrange for drawings to be prepared by the BSI Drawing Office;
- co-ordinate the resolution of technical and editorial queries;
- circulate all relevant documentation via eCommittees (see page 12);
- keep the panel/committee informed of progress with the draft;
- work to publish the standard on schedule.

The content developer is not involved in “supporting committee services”, e.g. issues relating to the composition of a committee or its membership. These are the responsibility of the committee secretary, who is usually a BSI programme manager.

Roles and responsibilities

The chairman

Effective chairing can make a great difference to the efficiency of the development process.

The responsibilities of the chairman are to:

- be familiar with BS 0, BSI procedures and the key stages of the development process (see page 4);
- safeguard the impartiality and integrity of the development process;
- work closely with the content developer to ensure that drafting progresses on schedule and that any difficulties are resolved quickly;
- encourage all members to complete work within agreed timescales;
- run meetings effectively and ensure that discussions are succinct and focussed;
- be decisive, where necessary;
- approve drafts for public comment (DPC) and publication promptly.

Panel and committee members

Panel/committee members are the essential element in the drafting of any standard and the success of a project will rely on their commitment and technical expertise.

The responsibilities of members are to:

- be aware of BS 0, BSI procedures and the key stages of the development process (see page 4);
- register with eCommittees (see page 12);
- actively participate throughout the development process and ensure that their availability is such that the project will not be delayed;
- provide relevant technical input, attending meetings where necessary and completing work between meetings;
- review all drafts carefully, prior to meetings, and raise comments or objections within agreed timescales;
- maintain close and effective working links with the organizations that they represent, keep them informed and take briefs from them.

(See also “The BSI guide to standardization – Section 1 – Part 3”.)

Overview of the development process

Proposal

A proposal for new work is submitted to BSI. Proposals are usually generated by the committee.



Project acceptance

A business case is prepared by the committee secretary with guidance from the committee.

This is submitted to the relevant BSI acceptance team for review.

Once the project is formally accepted, a content developer is assigned.

Committee secretary + committee:

- prepare business case for new project



Drafting

Drafting is generally carried out by a small panel of experts, together with the content developer. Several versions of the draft might be produced before it is finalized.

Panel:

- writes draft, employing technical expertise and liaising as necessary

Content developer:

- assists panel during drafting by providing editorial input, circulating updated drafts and co-ordinating meetings
- edits draft in line with BS 0-2
- arranges for any drawings to be prepared by the BSI Drawing Office



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 Draft Review System (see www.bsigroup.com/drafts).

Content developer:

- circulates draft to all interested committees
- acts as primary contact for comment submission

Panel + committee(s):

- forward draft to nominating organizations and advise external contacts
- submit any outstanding technical comments



Approval for public comment

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

Content developer:

- circulates draft
- makes arrangements for DPC period, including announcement in "Update Standards" magazine

Committee(s):

- reviews draft

Panel:

- reviews draft and approves for public comment

Overview of the development process

Comment resolution

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

Content developer:

- collates and circulates comments
- advises on editorial issues
- updates draft to reflect decisions made
- circulates list of decisions made to the panel (and committee, where required)

Panel:

- reviews all comments and agrees action to be taken

Final approval

A final draft is prepared by the content developer, 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 before the standard can be signed off for publication.

Content developer:

- prepares final draft
- circulates draft

Panel + committee(s):

- review draft and approve for publication

Publication

The standard is published and details of the new publication are made available on the BSI website and through "Update Standards".

BSI aims to publish new/revised British Standards, Drafts for Development and National Annexes within 12 to 15 months. Published Documents take around 9 months and amendments 6 to 12 months.

(Standards are reviewed within 5 years to ensure their continuing accuracy.)

Typesetting

The content developer submits a manuscript to the Production team for typesetting.

Content developer:

- prepares manuscript
- checks proofs
- approves proofs of the typeset document for publication

Endorsement to publish

The committee secretary and chairman of the relevant technical and/or subcommittee endorse the draft for publication.

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

Committee secretary + chairman:

- sign draft off for publication

BS 0-2 – the drafting rules

All British Standards are written in accordance with BS 0-2. This is the second part of the British Standard for standards and specifies requirements for their drafting and structure. Its aim is to ensure that standards are clear, consistent and usable.

Content developers are involved in the drafting process to help panels/committees understand and implement the rules of BS 0-2. Some of the more common issues and queries are outlined in this section.

Audience

The audience of a British Standard should be decided 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.

The intended user of any standard should generally be a single party. For example, a specification will commonly address the manufacturer of a product. It should not specify requirements for the purchaser of the product to comply with, as once a product or material is sold the manufacturer has no control over what the purchaser does with it. Similarly, a code of practice might include recommendations for the designer and installer of a system, but should not address the manufacturer of component parts.

Overview of BS 0-1

BS 0-1 specifies the role of BSI, as the UK national standards body, and that of its committee members in the preparation of standards (of national, European and international origin).

It covers topics such as governance structure, e.g. the composition of committees, intellectual property and the key stages of the development process (which are outlined on pages 4 and 5 of this document).

The issue of consensus is also addressed, and this is an important 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".

(See also "The BSI guide to standardization – Section 1 – Part 3".)

BS O-2 – the drafting rules

Types of publications

Content developers are responsible for producing, revising and amending:

- formal British Standards, of national origin (BSs);
- Published Documents, of national origin (PDs);
- Drafts for Development, of national origin (DDs);
- National Annexes to the Eurocodes (NAs).

A BS, PD or DD will usually be drafted as one of the following.

Specification

A specification specifies requirements that have to be met, usually by a product or a material, in order for conformity to be claimed. (Process specifications, e.g. for management systems, are also quite common.)

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 (provided, for example, as an annex within the specification or by reference to another standard).

Code of practice

A code of practice gives recommendations 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 and the recommendations should be as unambiguous as possible.

Claims of compliance can be made to a code of practice.

Method

A test method gives detailed instructions for carrying out one or more procedures for measurement, testing, sampling or evaluating performance.

A test method can only give the procedure itself; it cannot specify what the outcome of a test or measurement is to be. This is given in a specification.

Guide

A guide is similar to a code of practice but is generally more discursive and informative, with fewer recommendations.

A guide does not support claims of compliance or certification.

BS O-2 – the drafting rules

Provisions

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

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

The provisions have to:

- be consistent, accurate and within the control of the user (see page 6);
- be technically robust, practicable and achievable;
- take full account of the state of the art and provide a framework for future technological development;
- 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 or guide	Recommendations	"The product should be installed in accordance with..."
Method	Instructions	"Condition the sample for 2 h at a temperature of 65 °C"

Normative vs informative

Provisions are known as the "normative" element of the text.

e.g. "Copper pipes shall conform to BS EN 1057." (specification)

The "informative" element comprises any guidance on, or background to, the provisions. It is presented in the form of notes and/or commentaries.

e.g. "NOTE Copper is, in general, suitable for hot and cold water applications."

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.

BS 0-2 – the drafting rules

Verbal forms

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

Verb	Implication	Typical context
shall	Requirement	Normative element of a specification
should	Recommendation	<ul style="list-style-type: none">• 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	Possibility and capability	Informative element of any standard
is	Description	Informative element of any standard

The following verbs should be avoided.

Verb	Notes
must	Use in provisions is specifically prohibited by BS 0, to avoid confusion with external statutory obligations
will	Should be avoided as it can be ambiguous and standards cannot predict the future

Differences between British and European drafting rules

CEN has less stringent drafting rules than BSI, and these are also enforced less rigorously. A purely national project needs to be edited according to BS 0-2, not the CEN rules. Therefore, text cannot simply be copied from a European Standard; it has to be re-edited. This applies to both wording and structure.

Changes to the drafting rules

When an older standard comes up for revision, it is essential that the draft is re-edited to ensure that it conforms to the current version of the drafting rules. Therefore, it is not always possible to copy text directly from a previous edition for use in a new draft.

BS O-2 – the drafting rules

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 legislative or statutory instruments. Panels/committees 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 at the point of publication, it would soon 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 strictly factual.

Panels/committees should also bear in mind that, in some instances, there are three 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: "NOTE Attention is drawn to the Gas Safety (Installation and Use) Regulations 1998...".

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, available in the market place as a service to manufacturers and purchasers but not in any way imposed on them.

If third-party certification or independent assessment is considered by the committee to be desirable, standard wording to that effect should be included in the foreword.

Drafting meetings

Drafting meetings are held as often as is deemed necessary by the panel/committee. For some projects, it might well be possible to complete the work without meetings, i.e. by correspondence.

Location and times

Meetings are generally held at BSI's offices in London, which are located at 389 Chiswick High Road, above Gunnersbury Underground Station.

Start and finish times vary depending on members' preferences, although a 10.30 start is common. It is recommended that finish and lunch/break times are agreed at the beginning of the meeting.

Attendance

If meetings are deemed necessary, it is essential that panel/committee members attend as frequently as possible so that drafting is not delayed.

The content developer will both co-ordinate and attend drafting meetings unless otherwise agreed. This enables the draft to be updated "live" on a projector screen and allows members to follow the changes that have been discussed.

Agenda, minutes and actions

The content developer will not produce a formal agenda or minutes of the meeting as the draft is considered to be a record of decisions.

However, any action points will be circulated following the meeting. In order for drafting to progress on schedule, it is important that these are carried out by the agreed deadlines.

Electronic drafting

eCommittees

eCommittees is a web-based system that provides a working environment for panels and committees at BSI. Among other functions, the system allows members to access committee documents and hold online meetings and email discussion forums.

A username and password is sent to all members on joining a panel or committee.

It is essential that you log in to the eCommittees 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://ecommittees.bsi-global.com>).

To use eCommittees, it is necessary to have:

- a modem capable of at least 56 kb/s;
- a program to view and print documents in pdf format, e.g. Adobe Acrobat reader, and a program to open zip archive files, e.g. Winzip (see page 14 for Adobe and Winzip downloads);
- the ability to view Microsoft Word documents, version 6.0 or higher.

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

Microsoft Word

Drafting is undertaken in Microsoft Word (2003), using a BSI template.

At the beginning of drafting, the content developer will inform the panel/committee how he/she plans to manage the draft. The following points should be noted:

- version control is vital as it allows the development of the draft to be traced so the content developer will generally retain a master version of the draft;
- all changes, made by either the content developer or members, should be tracked using the “Track Changes” function (found in the Tools menu), unless otherwise agreed;
- drafts might be circulated in pdf format.

Benefits of involvement in standardization

Panel/committee members are likely to benefit from helping to develop standards, whether they are manufacturers, consumers, academics or regulators.

Members can:

- influence the content of standards;
- gain detailed advance knowledge of standards and so anticipate requirements and trends;
- get to know their peers and others who influence industry, such as the business community, consumers, users, government and regulators;
- win recognition through association with leaders in the field and in media coverage promoting the standard;
- be nominated to represent the UK on European or international committees;
- attend free training courses (see www.bsigroup.com/cmtraining) to complement their standards work, for which topics include:
 - an introduction to the standardization process;
 - drafting standards;
 - legal aspects of standards;
 - chairing meetings;
 - creative and innovative problem solving;
 - handling difficult people and situations;
 - working across cultures;
 - awareness of environmental aspects in standardization.

(See also “The BSI guide to standardization – Section 1 – Part 1”.)

Further information

Useful websites

The following websites will be of use during drafting.

BSI

www.bsigroup.com

BS 0 and “The BSI guide to standardization”

<http://www.bsigroup.com/en/Standards-and-Publications/About-BSI-British-Standards/How-we-produce-British-Standards/>

BSOL (British Standards Online) database of standards

<http://bsol.bsigroup.com>

Draft Review System

www.bsigroup.com/drafts

eCommittees

<https://ecommittees.bsi-global.com>

Member training

www.bsigroup.com/cmtraining

Software downloads (for eCommittees)

<http://get.adobe.com/uk/reader/> (Adobe Acrobat Reader)

<http://www.winzip.com/downwz.htm> (Winzip)

Contact details

If you have any queries relating to the drafting of your standard, please contact your content developer.