Toolkit for ISO Convenors

(produced by BSI International Secretariats)

ISO Convenor Toolkit

Contents

Foreword

First, we would like to thank you for the time and experience you provide to standardization by being a Convenor. We would like to reiterate that BSI remains fully committed to supporting its UK Convenors. We recognize that our Convenors give their time on a purely voluntary basis. Hence, we have put together this toolkit, which we hope you will find useful.

In this document we have collated information that we believe is vital to the role of a Convenor. The areas covered are:

- training;
- booking a meeting;
- eCommittees — the electronic document circulation system;
- drafting and editing information;
- ISO rules and procedures.

There is a discrete section on each of these with many links to useful web pages.

Finally, if you have any suggestions for changes to the content please send them to:

atlas@bsigroup.com

1   Training

Both BSI and ISO provide dedicated training courses that will help you in your role as Convenor.

At BSI we have face-to-face and e-learning modules that will provide information on the ISO system, as well as some of the soft skills that you may need in the role. We recommend that all Convenors of ISO Working Groups (WGs) attend the following free courses:

- Understanding International (ISO) Procedures;
- Drafting Standards;
- Handling Difficult People and Situations;
- Influencing and Persuading with an Introduction to Negotiation;
- Chairing Meetings;
- Working Across Cultures;
- Awareness of Environmental Aspects in Standardization;
- Legal Aspects of Standards;
- ISO templating workshop.

We realize it is difficult for many people to attend our courses in Chiswick; hence the following are available as e-learning modules that can be accessed at any time and are recommended to ISO Convenors:

- Understanding International (ISO) Procedures;
- Drafting Standards;
- Copyright and Patents.

Naturally, the e-learning modules can also be completed by those who attend instructor-led training.

We are looking at developing a workshop-type training session aimed specifically at Convenors, which we hope to roll out late in 2010.

At the BSI Committee Members training website you can find more details about the specific courses, register to attend or log on to the e-learning website:
http://www.bsigroup.com/en/Standards-and-Publications/Committee-Members/Committee-member-training-courses/

ISO provides training too, in Geneva, and currently there is one e-learning course:
http://www.iso.org/iso/standards_development/it_tools/training-standards_development.htm

2.   Meetings

Meetings in the UK

Meetings in the UK will normally be held at the BSI offices in Chiswick, West London.

To arrange a meeting of an ISO WG at BSI, as Convenor of the WG you should get in touch with the BSI contact for the UK national committee contributing to the International work, indicating the meeting date(s), start and finish times, and size of room required. Rooms at BSI are often booked up well in advance, so it is recommended to make room reservations six months in advance if possible.

Meetings may also take place at venues other than BSI. In this case, you should make arrangements with the UK expert(s) responsible for providing the venue, but should also keep the UK national contact informed.

Meetings elsewhere in the world

Meetings not held in the UK will normally be held at the offices of the national standards body (NSB) of the country concerned. To arrange a meeting of the WG you should ask the nominated expert(s) of the country concerned to get in touch with their NSB. The national expert(s) or you as the WG Convenor should then inform the NSB contact of your needs — meeting date(s), start and finish times, and size of room required, etc. It is recommended to make a room reservation six months in advance if possible.

Meetings may also take place at venues other than the offices of the NSB concerned. In this case, as Convenor you should make arrangements with the national expert(s) responsible for providing the venue, but should also keep the NSB informed.

UK Convenors can apply for the Assisted International Travel Scheme (AITS) funding via the BSI contact for the UK national committee:
https://ecommittees.bsi-global.com/llbsi/llisapi.dll?func=ll&objId=1442661&objAction=browse&sort=name&viewType=1

Meeting room facilities

If it is necessary to have additional facilities available at the meeting, e.g. data projector, flipchart, internet access (wi-fi or otherwise) and/or telephone link for long distance participation, this should be indicated to the national contact as early as possible.

Hospitality

It is commonly the case that tea, coffee, small snacks and water are made available in meeting rooms free of charge.

Depending on the venue and/or host for a meeting, further hospitality might be provided free of charge, in the form of lunch and/or an evening meal. However, no assumption should be made about this — there is no obligation for such hospitality to be provided.

Virtual meetings

It is recommended that as much work as possible, between physical meetings, should be done electronically. Information about the web conferencing tool can be found at: http://www.webex.com and if who want a WebEx account (www.webex.com), please send an email to: Anne Miauton miauton@iso.org or webconferencing@iso.org and provide the following information: First name, Last name, Email address, ISO role and Country.

For every meeting

For each meeting a report should be produced and circulated to the attendees. An attendance record shall also be kept.

3 ISO Livelink (eCommittees)

ISO Livelink (eCommittees) is a web-based environment aimed at supporting ISO Technical Committees and WGs to efficiently exchange documents, thereby enhancing the collaboration among all members of such groups. ISO eCommittees is a password-protected system and only registered users have access to it.

ISO Livelink committees can be accessed via:
http://isotc.iso.org/livelink/livelink?func=ll&objId=2122&objAction=browse&sort=name

The committee's Work Programme can be found in the ISO Project Portal, which is a link from the Livelink committee homepage.

As an ISO WG Convenor you must have access to ISO Livelink and the rights to upload 'N-numbered' documents in your WG area. Please get in touch with the BSI national contact for a username and password. If your specific WG area is currently not available, please contact the ISO committee secretary to arrange for folders to be set up.

There is an *ISO eCommittee Guide for Secretaries and Convenors*, which provides all the information necessary to assist you as WG Convenor with ISO Livelink (eCommittees) and its use:
http://isotc.iso.org/livelink/livelink?func=ll&objId=8723802&objAction=browse&viewType=1

NSBs are responsible for registering their experts on the Livelink WG folders — the maximum number of users per member body is five.
http://isotc.iso.org/livelink/livelink?func=ll&objId=5157776&objAction=browse&viewType=1

4 ISO rules and procedures

The ISO web page for 'Standards development', containing numerous useful links, can be found via:
http://www.iso.org/iso/standards_development.htm

ISO/IEC Directives, Part 1, Subclauses 1.12.1 and 4.2.2 concern the workings of WGs:
http://isotc.iso.org/livelink/livelink?func=ll&objId=4230455&objAction=browse&sort=subtype
A WG should be reasonably limited in size. Its parent body can decide upon the total number of experts and also the maximum number of experts appointed by each P-member.

It should be noted that WGs operate by consensus: ISO/IEC Directives, Part 1, subclause 2.5.6.

ISO *Supplement — Procedures specific to ISO*, Annex SE.3 summarizes the role and responsibilities of an ISO Convenor:
http://isotc.iso.org/livelink/livelink?func=ll&objId=4230452&objAction=browse&sort=subtype

My ISO job:
http://www.iso.org/iso/my_iso_job.pdf

Familiarise yourself with committee structures:
http://www.iso.org/iso/standards_development/technical_committees/list_of_iso_technical_committees.htm

Stages of the development of International Standards:
http://www.iso.org/iso/standards_development/processes_and_procedures/stages_description.htm

Target date planner — two-, three- and four-year time-frames:
http://isotc.iso.org/livelink/livelink/fetch/-8921162/8921180/3886931/6461502/2._ISO_target_date_planner.pdf?nodeid=6463352&vernum=-2

Comments submitted in the commenting template at formal consultation stages (CD, DIS) need to be formally addressed and the outcome recorded in a 'Comments resolution report' (Disposition of comments document):
http://isotc.iso.org/livelink/livelink?func=ll&objId=5156909&objAction=browse&sort=name

Draft standards need to be submitted in the ISO template:
http://www.iso.org/iso/standards_development/it_tools/iso_templates.htm

Rules on how to draft a standard: ISO/IEC Directives, Part 2:
http://isotc.iso.org/livelink/livelink?func=ll&objId=4230456&objAction=browse&sort=subtype