



# Getting started toolkit

for ISO Committee Chairs



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# Abbreviations

<http://www.iso.org/glossary.html>

Acronym	Abbreviation
CD	Committee Draft
DIS	Draft International Standard
EM	Editorial Manager
FDIS	Final Draft International Standard
IEC	International Electrotechnical Commission
IPR	Intellectual property rights
ISO	International Organization for Standardization
ISO/CS	International Organization for Standardization/Central Secretariat
NSB	National standards body
NP	New work item proposal
SBP	Strategic business plan
SC	Subcommittee
TC	Technical committee
TMB	Technical Management Board
TPM	Technical Programme Manager
WD	Working Draft
WG	Working Group
WTO	World Trade Organization

This guidance document is designed to assist ISO Committee Chairs with ISO's technical work.



The following publications prevail in any case:

- ▶ ISO Statutes
- ▶ ISO/IEC Directives, Part 1 – Procedures for the technical work
- ▶ ISO/IEC Directives, Part 2 – Rules for the structure and drafting of International Standards
- ▶ ISO/IEC Directives, Consolidated ISO Supplement – Procedures specific to ISO
- ▶ JTC 1 Supplement – Procedures specific to JTC 1

# Welcome to ISO

Congratulations! You have just been appointed as Chair of an ISO committee. This is an important role in the ISO technical community as effective leadership on your part will be critical to your committee's success.

As Chair, you are responsible for the overall management of your committee, its subcommittees and working groups. You also play a direct role in the committee's day-to-day work. This requires you to think strategically, manage projects effectively, lead a committee towards consensus, inspire committee experts, act in a purely international capacity and foster cooperation with other relevant committees and partners.

The ISO Central Secretariat (ISO/CS) has a number of resources to assist you in your duties as Chair. Bringing together a wealth of useful information, this toolkit is designed to get you started in your new role. What's more, if you are new to ISO, the publication [My ISO job](#) provides an concise overview of ISO's work and the different roles that exist within the technical community.

For any further questions, please contact the ISO Technical Programme Manager (TPM) responsible for your committee at the ISO Central Secretariat (ISO/CS). You can find their name and contact email on your [committee page](#) on ISO online.

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# 1. The role of Chair

The Committee Chair's main responsibilities are:

## ► Lead meetings effectively and fairly

Help your committee reach consensus by ensuring that the views of all delegates and experts receive equal treatment.

## ► Act purely in an international capacity

A Committee Chair is impartial and does not represent any one country.

## ► Know and follow ISO procedures

Ensure that the ISO/IEC Directives are followed and that policy and strategic decisions made by the ISO Technical Management Board (TMB) are properly implemented. Also advise the TMB of important matters relating to the committee.

## ► Be cognizant of the subject, sector and market needs

Exercise strategic thinking to promote ISO's work in the sector. Consider divergent stakeholder interests, the value proposition of standards in the sector, as well as wider global trends and emergent transversal issues.

## ► Foster and value cooperation with other ISO and IEC committees and partners

Proactively reach out and collaborate with other committees when working on joint or related projects.

## ► Develop and follow the committee's strategic business plan

Create a business plan and stick to it! Drafted in accordance with the ISO/IEC Directives, Part 1, the strategic business plan should account for the wider market context, and the role of International Standards therein, and remain abreast of emerging trends in ISO's strategic planning.

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For a complete list of responsibilities, see the [ISO/IEC Directives](#), Part 1, Subclause 1.8.2 and [Annex L of the Consolidated ISO Supplement](#).

## Chair-elect

Committees now have the option of selecting a replacement Chair one year before the end of the current Chair's term. The replacement Chair then serves as "Chair-elect", allowing a one-year overlap during which the incoming Chair can learn about the committee from the outgoing Chair before taking over the role. Read more in the [ISO/IEC Directives](#), Part 1, Subclause 1.8.







## 2. Training

Each year, ISO/CS runs virtual training courses for the staff of ISO members and professionals involved in standards development activities. Designed with Chairs and Convenors in mind, a course on “Leading ISO work” focuses on developing leadership and consensus-building skills. Dates of sessions can be found on the ISO Connect page for **development and training**.



### eLearning courses

A number of eLearning courses on how to manage the international standardization work are under development and will cover basic, intermediate and advanced training levels. These courses will allow the different players in ISO's technical work (e.g. Committee Managers, Chairs, Project Leaders) to manage the development of International Standards more efficiently and effectively. They will be launched on the ISO Digital Learning Platform once they are ready.

The Chairs and Convenors course can also be organized at the national level upon request. For more information, see the dedicated publication **Chairs & Convenors training course – Description and practical information**.

→ Contact [capacity@iso.org](mailto:capacity@iso.org) for further information.



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## 3. ISO rules and procedures

### 3.1 ISO/IEC Directives

The **ISO/IEC Directives, Part 1 and Consolidated ISO Supplement** define the procedures to be followed in the development of International Standards and other documents. They will be your key point of reference for procedures relating to committee work.

→ For more information, see [www.iso.org/directives](http://www.iso.org/directives).

Other resources include:

- **JTC 1 Supplement**: Basic procedures specific to JTC 1 for the drafting of International Standards and other documents.
- **ISO/IEC Directives, Part 2**: Principles for structuring and drafting documents intended to become International Standards, Technical Specifications, Publicly Available Specifications or Technical Reports.
- **Drafting standards web page**: Guidance for writing clear, concise and user-friendly ISO International Standards and other related documents. It should be used in conjunction with the ISO/IEC Directives, Part 2.

### 3.2 ISO Code of Ethics and Conduct

Creating and maintaining an ethical culture is not only the right thing to do, it's also a strategic advantage that can enhance the performance of your committee's work. The **ISO Code of Ethics and Conduct** sets out principles for the conduct of persons acting for or on behalf of ISO, i.e. individuals representing ISO members, ISO governance groups and their members, the ISO standards development community, including liaison organizations, and the Central Secretariat.

The ISO Technical Management Board has developed a set of best practices for enforcing ethical conduct and monitoring its effectiveness and compliance. You are encouraged to follow these guidelines:

- **Suggestions for implementation of the ISO Code of Ethics and Conduct at the standards development level**
- **Guidance and process for addressing misconduct and breaches of the ISO Code of Ethics and Conduct.**

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## 3.3 ISO Global Relevance Policy

The adoption of the World Trade Organization Technical Barriers to Trade (WTO/TBT) Agreement has placed an obligation on ISO to ensure that the International Standards it publishes are globally relevant.

→ For details, see the [WTO ISO Standards Information Gateway](#).

Before embarking on a new project, ISO committees should ask the following questions:

- Is a globally relevant International Standard that presents a unique solution in all of its provisions viable?
- Is developing an International Standard whose provisions account for all existing and legitimate market differences feasible?

Answering these simple questions will help you decide whether or not to initiate the development of the proposed standard.

→ To assist you in your decision, please consult ISO's [Global Relevance Policy](#), whose practical guidance is vital to preserving ISO's international credibility.



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## 3.4 Intellectual property rights, copyright and trademarks

Intellectual property rights and other legal issues, as they pertain to technical committees, are addressed on the “[Intellectual Property](#)” page on ISO Connect. There, you will find answers to the following questions:

- How can you protect ISO's copyright in ISO standards?
- How do you address copyright issues related to the content of ISO standards (see also: [Declaration for participants in ISO activities](#))?
- How can technical committees use the ISO short name and logo (see also: [ISO name and logo](#))?
- Third-party trademarks, services or products in ISO standards should, in principle, be avoided. How do you circumvent these issues?
- What procedures should be followed when citing patents in ISO standards (see also: [ISO standards and patents](#))?

→ For further information, contact your TPM or email [logo@iso.org](mailto:logo@iso.org).

## 3.5 Competition law

Compliance with competition law in the standards-setting process is essential to ensure that markets operate efficiently and competitively, and that the ISO standards development process remains a platform of trust. To facilitate compliance, ISO has drafted joint [Competition Law Guidelines for Participants in the IEC and ISO Standard Development Process](#).

→ Contact your national member or the Technical Programme Manager, who will be able to answer any questions you may have.

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## 3.6 Communication and data protection

Participants in the ISO standards development process may be asked (e.g. by the media), or may wish of their own initiative (e.g. through social media), to share information with external parties about various aspects of committee work. The following documents seek to advise ISO committees in their communications activities:

- The [ISO policy on communication of committee work](#) helps standards experts communicate about committee work to external parties.
- ISO's [social media guidelines](#) dispense advice on how to talk about your ISO work on social media or create an account for your committee.

The ISO communication policy builds on ISO's data protection policies. Anyone taking part in ISO standards development work has rights and obligations related to data protection. These are enshrined in the [ISO Member Data Protection Policy](#) and a [Declaration for participants in ISO activities](#) to which all those involved in ISO's standardization work must adhere.

→ Any questions regarding the [Policy](#) or the [Declaration](#) can be directed to the ISO Data Protection Officer: [DataProtectionOfficer@iso.org](mailto:DataProtectionOfficer@iso.org).



## 4. Project management

### Meeting market expectations

Strong project management skills are an asset for a Committee Chair to ensure they can fulfil their mission of delivering ISO standards and other deliverables where the market most needs them.

At ISO, project management is important to:

- Uphold the quality of ISO deliverables
- Ensure resource efficiency (since ISO activities are performed on a voluntary basis)
- Meet stakeholder needs and market expectations (i.e. timely delivery of standards and other documents)
- Align with the TC's strategic business plan and the overarching ISO Strategy 2030

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A skilled Chair is essential to facilitate committee work by keeping the work in line with the committee's strategic business plan.

This includes :

- Overseeing the committee's strategic planning, driving consensus on its strategic objectives, stakeholder engagement and the prioritization of projects
- Understanding the added value of International Standards in the TC's field of activity within the wider social, economic and/or technological context
- Engaging in transversal studies across multiple committees to harmonize, align and coordinate committee work
- Identifying priorities, market and stakeholder expectations and assessing what resources are available for planning purposes
- Assessing potential risks related to a project while highlighting any obstacles that might hamper its development (consensus, market divergences)
- Moving the work forward by helping working groups (WGs) to arrive at a consensus (for example, by reinforcing the committee's strategic objectives and vision at WG meetings)
- Drafting and updating the project plan with the help of the Committee Manager

## Keeping up with change

ISO/CS periodically updates its tools and services for standards development, which may affect your committee's work processes. To be notified of any changes, subscribe to the [“Changes to ISO services”](#) page on ISO Connect by choosing “Watch” from the Tools menu.

NOTE: Access ISO Connect using your Global Directory username and password.

The [ISO/IEC Directives, Part 1 and Consolidated ISO Supplement](#) are also updated every year – a new edition is released in May. Your Technical Programme Manager will keep you informed of any changes via your TC/SC Committee Manager. The [TMB Communiqué](#), published after each meeting of the Technical Management Board, also provides important news for the technical community. Published three times a year, the [TMB Communiqué](#) is sent out to all Chairs, Committee Managers and Convenors and is also available on the ISO website.

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# 5. Participants in ISO's technical work

Chairs must be acquainted with the rights and obligations of the various actors involved in ISO committee meetings (see the [Consolidated ISO Supplement, Subclause 1.7](#)).

## 5.1 ISO membership status

There are three member categories in ISO:

- Full member
- Correspondent member
- Subscriber member

Each member category has different rights of participation in ISO committees. For example, only full members can actively participate in the development of International Standards.

NOTE: The New Rights Programme (Council resolution 03/2013, 22/2015 and 43/2019) allows correspondent and subscriber members to participate in a maximum of five committees for up to five years with training and support from ISO.

→ For more information, refer to the ISO membership manual, available for download on the ["Members" page](#) of the ISO website.

## 5.2 Delegates and experts

ISO committee members (P- and O-members) appoint delegates to attend committee meetings: they hold the views of their national member body on the international stage. Conversely, working group **experts** are nominated by their national standards body, that is a P-member in the committee. While they act in a personal capacity, they should be aware of their country's national position.

Their position is as follows:

<b>Working group level recommendations:</b>	one expert = one voice
<b>Committee-level decisions:</b>	one P-member = one vote



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### Participating members (P-members)

P-members have an obligation to contribute to committee meetings and cast their vote on all matters formally put to the vote. P-members get automatic reminders to vote from ISO/CS while ballots are open. Failure to vote will result in a warning from ISO/CS and a downgrade to O-member status if no explanation is given (see [ISO/IEC Directives, Part 1, Subclauses 1.7.4 & 1.7.5](#)).

If a P-member remains inactive (i.e. it has failed to contribute to two consecutive meetings), it is the responsibility of the committee secretariat to notify ISO/CS, who will contact the member directly. Without substantial changes in behaviour, the P-member will be downgraded to O-member.

### Observing members (O-members)

O-members follow the committee's work and receive all the documents. They have the right to submit comments and attend meetings but cannot vote in the committee's internal ballots.

### Working group experts

Experts are appointed by the P-members of the parent committee (also by A- and C-liaisons, as well as by committees in liaison) (see [ISO/IEC Directives, Part 1, Subclause 1.12](#)). Working group experts do not formally represent the members who nominate them. They are selected based on their individual know-how and experience in a given subject and therefore act in a personal capacity.

## 5.3 Liaisons

Liaisons exist between ISO TCs/SCs, between ISO and IEC TCs/SCs, and with other organizations at the TC/SC level (categories A and B) and at the working group level (category C).

→ For more information on liaisons, see the [ISO/IEC Directives, Part 1, Subclauses 1.15-1.17](#).

Liaisons with external organizations shall be approved by the P-members of the committee.

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# 6. Meetings

## 6.1 Chairing a successful meeting

A good Chair helps the meeting to run smoothly and efficiently. Here are a few points to consider when chairing ISO meetings:

**Be impartial.**



**Be prepared for discussions on critical issues.**

**Make sure all countries are heard and every view receives equal treatment.**

**Summarize what was said on a given item, if needed.**

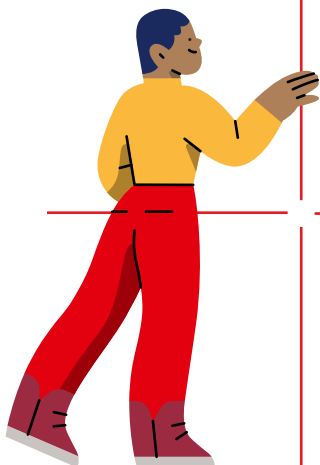


**Keep to the agenda and be mindful of time.**

**Deal with difficult situations in a supportive way; diffuse tension quickly before it escalates.**

**Remind native English speakers to speak clearly.**

**Set the example – behave according to the ISO Code of Ethics and Conduct and ask participants to do the same.**



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## 6.2 Hosting meetings

Meetings may be hosted by:

- Any ISO member (member body, correspondent member, subscriber member)
- Any liaison member of the committee concerned (for working group meetings only)

For TC or SC meetings, the ISO member in the country where the meeting will be held is considered the primary host and pre-approval of the meeting details is required. In the case of working group meetings, the ISO member in the country must be informed of the meeting before it is called. A member body wishing to host an ISO committee meeting must contact the TC/SC secretariat directly.

→ See [Annex SF to the Consolidated ISO Supplement](#) for details.

Meetings can be held in presence, hybrid or virtual mode: the committee leaders have to choose the best meeting mode, considering as example travel restrictions, any decision made by ISO Governance, travel costs, environmental considerations, matters to be discussed at the meeting. following the [participation guidelines](#) set jointly by the ISO Technical Management Board (ISO/TMB) and the IEC Standardization Management Board (IEC/SMB). This [checklist](#) will help meeting organizers decide on the optimal meeting format, given the circumstances.



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## 6.3 Organizing and managing meetings

The Committee Manager (CM) is responsible for planning, organizing and managing the details of the meeting. This includes coordinating with the host for the choice of venue, sending out invitations, distributing documents, etc. The CM is also responsible for the progress of the actual meeting, taking specific action before, during and after the meeting to ensure it reaches its goal successfully.

As the Chair, it is recommended that you don't leave the organization entirely up to the Committee Manager without checking. Make sure all needs are met, that the meeting agenda is realistic and achievable within the allotted time frame, and that it covers all items pertinent to the meeting's success. It is also a good idea to check the rooms and facilities (room setup, audio/video equipment, etc.) the day before the meeting to ensure everything is in order.

Finally, as Committee Chair, you will need to anticipate any questions or challenges that might arise during the meeting, make sure participants have been provided with sufficient background information to make relevant contributions, and, more generally, that appropriate preparations have been made to ensure the meeting is effective.

During meeting breaks, the Chair should circulate and engage in informal conversation with the different delegations.

All meetings are conducted in English by default (see [ISO/IEC Directives, Part1, Clause 4.3](#)).

→ For more information about ISO meetings, see the [ISO/IEC Directives Part 1, Clause 4](#) and [Annex SF of the Consolidated ISO Supplement](#).



### E-meetings!

ISO uses the Zoom web/video conferencing service. Participants don't need an account to participate in e-meetings; an account is only required for the person hosting the meeting.

→ For questions about ISO Zoom accounts, please contact the ISO Web Conferencing team at [webconferencing@iso.org](mailto:webconferencing@iso.org).

Get started with Zoom: <https://connect.iso.org/display/standards/Video+Conferencing>

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# 7. ISO electronic applications (e-Services)

## 7.1 Access

ISO has developed a set of electronic applications to support the standards development process. It can be accessed using the [ISO electronic application portal](#).

Note that access to ISO electronic applications is limited and managed by the NSBs and ISO/CS following established rules. Users must therefore be registered through their NSB or by ISO/CS in order to be issued a username and password.

## 7.2 ISO Documents

Since 2020, ISO has been using [ISO Documents](#) which provides Committee Managers and Convenors with the tools to manage their committee work.

→ Check the [Documents platform knowledge base](#) where you can find many resources to help familiarize yourself with ISO Documents. For questions related to ISO Documents, please contact [helpdesk@iso.org](mailto:helpdesk@iso.org)

ISO Documents is integrated with other ISO electronic applications such as the Electronic Balloting application and the [ISO Meetings](#) (see below). This integration allows you to display information on upcoming meetings and ballots on your ISO Documents homepage. When mapping National Mirror Committees (NMCs) and ISO committees in the Global Directory, national delegates can [directly access international committee documents](#). This considerably simplifies the circulation of documents withing NMCs.

The use of ISO Documents is mandatory for ISO committees (and for working groups).

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## 7.3 ISO Projects

ISO Projects gives detailed information about projects, their history, status and milestones. You can also view the work programme of any other committee.

ISO Projects provides enhanced core functionalities as well as new features such as:

- Improved portfolio monitoring with direct access to projects via a “My Projects” portfolio
- Integration of meeting dates in the project timeline to support planning, forecasting and reporting
- Use of target dates for intermediate and mandatory stages, with useful reminders
- Enhanced search function, with the option to save frequently used search criteria
- Ability to set and update your project’s target dates to better monitor your programme

Documents can be accessed directly through the Project Overview screen in the “Documents” card.



### Tip!

Use the “export function” to download a spreadsheet showing all the details of your committee projects – this document can be useful to have at committee meetings!

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## 7.4 Other electronic applications

Here are other useful tools to support your standards development work:

- **ISO Ballots**: voting platform supporting consensus feedback processes in ISO (e.g. votes on New Work Item Proposals, Draft and Final Draft International Standards, consultation on Committee Drafts, etc.)
- **ISO Meetings**: central database for ISO meetings (organizers, participants, ISO/CS)
- **Zoom**: web conferencing service offered free of charge to individuals with specific roles in ISO committees. (Learn more about web conferencing on **ISO Connect**.)



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### ISO helpdesk knowledge base

For guidance on how to use ISO's electronic applications, check out the online **knowledge base**. The ISO International Helpdesk ([helpdesk@iso.org](mailto:helpdesk@iso.org)) is also on hand to assist with any of ISO's electronic applications.

Both knowledge base and helpdesk contact form are also available from most ISO services via the beacon (read badge with a question mark at the bottom corner of the online service).

→ For questions on how access ISO electronic applications, contact your national standards body.



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## 8. Other useful resources

### Whom to ask for help

Still have questions? Here's where to go for help.

→ For technical issues around committee work or procedures: your TPM at ISO/CS

### For questions related to:

Electronic applications	<a href="mailto:helpdesk@iso.org">helpdesk@iso.org</a>
CD consultations, DIS, FDIS, SR and WDRL votes	<a href="mailto:votes@iso.org">votes@iso.org</a>
Committees and meeting management	<a href="mailto:tcsupport@iso.org">tcsupport@iso.org</a>
Submission of projects	<a href="mailto:projects@iso.org">projects@iso.org</a>
Development of ISO standards and other deliverables	<a href="mailto:standards@iso.org">standards@iso.org</a>
ISO/IEC Directives and Consolidated ISO Supplement	<a href="mailto:directives@iso.org">directives@iso.org</a>
Vienna Agreement	<a href="mailto:va@iso.org">va@iso.org</a>
Copyright and trademarks	<a href="mailto:logo@iso.org">logo@iso.org</a>
Zoom and video/web conferencing	<a href="mailto:webconferencing@iso.org">webconferencing@iso.org</a>

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## Helpful information and links

Check out these other information sources to help you with your work.

### Governance of technical work

- [TMB Communiqué](#)
- [ISO Connect guide](#)

### Guidance on drafting standards

- [Drafting standards](#) (dedicated web page)
- [ISO/IEC Directives, Part 2](#)

### Committee work and ISO procedures

- [Zoom training and support](#)
- [ISO quick guide to Zoom meetings](#)
- [ISO Code of Ethics and Conduct](#)
- [Guidance and process for addressing misconduct and breaches of the ISO Code of Ethics and Conduct](#)

### Other key policies and guidance

- [ISO Strategy 2030](#)
- [Vienna Agreement](#) on technical cooperation between ISO and CEN
- [ISO Global Relevance Policy](#)
- [Conformity assessment do's and don'ts](#)

### ISO online

- [ISO online resources](#)
- [ISO technical committees](#)
- [Online Browsing Platform](#)



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# About ISO

ISO (International Organization for Standardization) is an independent, non-governmental international organization with a membership of 169\* national standards bodies. Through its members, it brings together experts to share knowledge and develop voluntary, consensus-based, market-relevant International Standards that support innovation and provide solutions to global challenges.

ISO has published more than 24 900\* International Standards and related documents covering almost every industry, from technology to food safety, to agriculture and healthcare.

For more information, please visit **[www.iso.org](http://www.iso.org)**.

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ISO Website: [www.iso.org](http://www.iso.org)

ISO newsroom: [www.iso.org/news](http://www.iso.org/news)

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