



Getting started toolkit

for ISO Working Group Convenors

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Abbreviations

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

Acronym	Abbreviation
CD	Committee Draft
DIS	Draft International Standard
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
NP	New work item proposal
NSB	National standards body
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
WDRL	Withdrawal (ballot)

This guidance document is designed to assist ISO Working Group Convenors 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 Convenor of an ISO working group. This is an important role in the ISO technical community as effective leadership on your part will be critical to your working group's success.

As Convenor, you are responsible for calling and chairing working group meetings and for the development of the working group's project(s).

The ISO Central Secretariat (ISO/CS) has a number of resources to assist you in your duties as Convenor. 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 a concise overview of ISO's work and the different roles that exist within the technical community.

If you require any further assistance, please contact the Committee Manager of your parent committee. The Technical Programme Manager (TPM) responsible for your committee at ISO/CS is also on hand to answer any questions you may have. You can find their name and contact email on your [committee page](#) on ISO online.

1. The role of the Convenor

The Convenor's main responsibilities are:

► Lead meetings effectively and fairly

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

► Act purely in an international capacity

A Convenor is impartial and does not represent any ISO member or liaison organization.

► Project management

Ensuring that projects are managed according to agreed target dates and in accordance with the project plan. Managing documents and sharing them via ISO Documents.

► Know your subject

Make suggestions to progress or halt work based on market needs.

► Know and follow ISO procedures

Ensure that the ISO/IEC Directives are followed.

A Working Group is established by the parent committee to perform a specific task: make sure that the WG respects the mandate given by the parent committee.

→ For a complete list of responsibilities, see [ISO/IEC Directives, Part 1, Subclauses 1.12 and 2.1.8](#) and [Annex L of the Consolidated ISO Supplement](#).

2. Training

Each year, ISO/CS organizes 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.

Convenors may also wish to join an ISO Committee Managers’ training where they can learn the basics about ISO procedures, standards drafting and how to manage eServices.

→ Dates of sessions can be found on the [development and training page](#) on ISO Connect.



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 for further information.



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.

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 deliverables. 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 Working group'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.**

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?

→ More guidance can be found in **ISO's Global Relevance Policy**, whose practical and easy-to-understand guidance is vital to maintaining ISO's international credibility.

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](#))?



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.

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.



4. Project management

Meeting market expectations

Strong project management skills are an asset for a Committee Manager to ensure they can fulfil their mission of supporting delivery of ISO standards 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

As a Working Group Convenor, your role is pivotal for the successful delivery of high-quality standards that respond to the market need. With the help of the Committee Manager, you are uniquely positioned to provide insights on market needs, workload and time frames and the overall status of the project.

This includes as a minimum:

- Ensuring that projects developed under your working group are aligned with the agreed workplan
- Proposing concrete actions and solutions to the Project Leader and working group
- Keeping the Committee Manager updated on the status of projects
- 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.

5. Developing ISO deliverables (IS, TS, PAS, TR)

5.1 Guidance and drafting rules

- The **Drafting standards** web page provides guidance on how to write clear, concise and user-friendly International Standards and deliverables. It should be used in conjunction with the **ISO/IEC Directives, Part 2**, which gives detailed authoring and editorial rules for drafting ISO deliverables → www.iso.org/directives
- Another useful resource for drafting standards is the **Online Browsing Platform (OBP)**, which allows users to preview the content, run full-text searches and more. You can use the OBP to check whether key terms have already been defined, so as to avoid redefining the same term (click on “Terms and definitions” and use the search function) → www.iso.org/obp/ui/

5.2 Submitting drafts to ISO/CS

Once the draft has been prepared by the committee, it is released for comments and votes to all ISO members, including those not participating in the committee. the Committee Manager shall submit the draft to ISO/CS at the DIS stage (and the FDIS stage, if used) on ISO Projects.

NOTE: New Work Item Proposals ballots and CD consultations are **managed** directly by the Committee Manager, not sent through ISO/CS.

→ More information is available in the **Requirements and guidelines for the submission of drafts to ISO/CS**.

6. Other committee documents

Documents distributed to the committee shall contain specific information, such as a subject line, reference number, title, expected action, etc. [Annex SB](#) of the [Consolidated ISO Supplement](#) provides a list of these requirements and a table showing who needs to send what and relevant deadlines are in [Annex SK](#).

When sending documents to the committee using the [Documents platform](#), a unique identifier, referred to as an [N-number](#), is assigned by the platform.



7. Participants in ISO's technical work

Committee Managers shall be acquainted with the rights and obligations of the various actors involved in ISO committee activity (see the [Consolidated ISO Supplement, Subclause 1.7](#)).

7.1 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 by appointing experts to Working Groups.

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 ISO's website.

7.2 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:

Working group level recommendations:	one expert = one voice
Committee-level decisions:	one P-member = one vote

7.3 Experts in working groups

Experts are appointed by the P-members of the parent committee (also by A- and C-liaisons) (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.

7.4 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). Liaisons are of primary importance for coordinating the work programmes of different committees, for ensuring a better use of the deliverable after publication and to engage stakeholders.

→ More information is available in the Liaisons toolkit.

Liaisons must be approved by consultation with the P-members of the committee. For more information on liaisons, see the [ISO/IEC Directives, Part 1, Subclauses 1.15-1.17](#).

8. Meetings

8.1 The Convenor's role in ISO meetings

The Convenor is responsible for bringing participants together in a collaborative spirit to work on the issue of the meeting, carrying out the preliminary and follow-up tasks that ensure a smooth process.

Here are a few points to consider:



Be impartial.

Circulate attendance lists (if Committee Manager is not present).

Ensure agenda is followed and completed on time.



Circulate document(s); use project management to set deadlines.

Listen, summarize and draft recommendations for approval by the parent committee.



Remind native English speakers to speak clearly.

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

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

8.2 Hosting meetings

WG meetings may be hosted by any WG member, remembering that the ISO member of the country where the meeting is held shall be informed about the WG meeting in their country.

Before the meeting, send the information about sponsorship to the TPM using the **dedicated form**.

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 by 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.



8.3 Organizing and managing meetings

Working group meetings are much more informal than meetings organized at the committee level. However, there are a couple of rules to bear in mind when a new working group is formed:

- The new WG has to hold its first meeting within 12 weeks after establishment.
- All P-members, A- and C- liaisons are invited to appoint experts within 6 weeks after the WG has been established.

The Convenor is responsible to determine when consensus is reached, to limit discussion to accepted limits, referring to documents to avoid repeating the same discussion.

Ensure that all participants to your meeting have been registered by their P-member or liaison on the Global Directory. If you exceptionally invite a guest to attend a meeting, inform the TPM and the Committee Manager in advance and limit attendance to two meetings.

To facilitate the process, a checklist has been developed to assist Convenors with meeting organization and management (see [Annex A](#)).

All meetings are conducted in English by default ([ISO/IEC Directives, Part 1, 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 a virtual meeting; an account is only required for the person hosting the meeting, usually the WG Convenor.

→ Information about Zoom (account eligibility, how-to, support) can be found here: <https://connect.iso.org/display/standards/Video+Conferencing>
Get started now with Zoom!

9. ISO electronic applications (e-Services)

9.1 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.

9.2 Documents platform

Documents is the mandatory platform to make documents available to the committee members in a password protected environment.

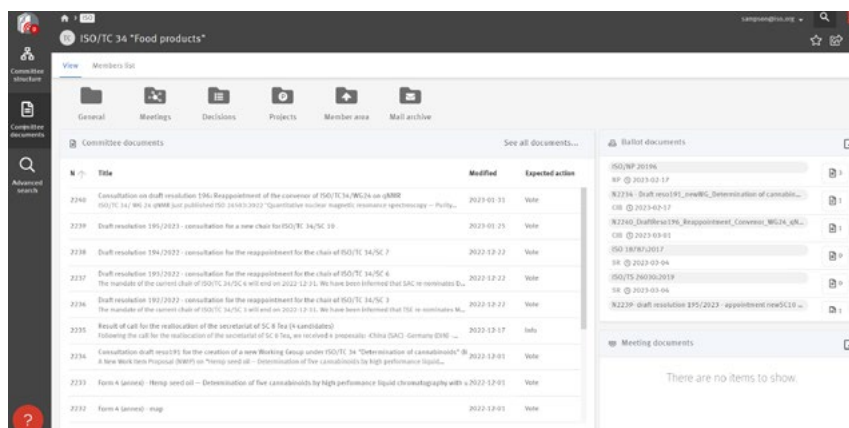


Figure 2: Documents platform

9.3 ISO Projects

ISO Projects gives detailed information about ISO projects, their history, status and milestones. It helps you monitor your work programme, define intermediate milestones (dates and targets) on your way to meeting mandatory stage limit dates. New Work item Proposals shall be made using the eForm4 available on the platform. Finally, the platform lets you view the work programme of any other committee as well as submitting drafts to ISO/CS at specific stages.

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, both for intermediate and mandatory stages, with useful reminders
- Enhanced search experience, with the option to save frequently used search criteria

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 Working Group projects – this document can be useful to have at WG meetings!



Tip!

It's a good idea to use ISO Projects to periodically check up on standards and other deliverables that are normatively referenced in your documents to see if they are undergoing revision. This is because any changes in the referenced document could impact requirements given in your own document.

The screenshot shows the 'Search (15)' results page in the ISO Projects tool. The interface includes a left sidebar with navigation options: PROJECT, My projects, Search, Inbox, and ICS. The main content area displays a table of search results. Annotations highlight key features: 'Pre-filtering on your committees on "My Projects" tab' points to the 'My projects' tab; 'Access the options to save your search or export the results to Excel' points to the 'Submit to ISO/CS' and 'Proceed to decision' links; and 'Click on the document reference to access its projects details page' points to a document reference in the table.

Reference	Title	Current stage	Committee	Action
ISO/PWI 32124 ed.1- id.86628	Transaction assurance in e-commerce - Guidance for online sales related to live commerce	00.00 Since 2023-02-28	ISO/TC 321/SG 2	
ISO/PWI TR 32123 ed.1- id.84984	Transaction assurance in E-commerce - After sales services for E-commerce	00.00 Since 2022-04-21	ISO/TC 321	
ISO/CD 32122 ed.1- id.84834		0 e 2023-07-	ISO/TC 321/WG 3	Submit to ISO/CS Proceed to decision

Figure 3: ISO Projects

9.4 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**.)



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) 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.

10. 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	helpdesk@iso.org
CD consultations, DIS, FDIS, SR and WDRL votes	votes@iso.org
Committees and meeting management	tcsupport@iso.org
Submission of projects	projects@iso.org
Development of ISO standards and other deliverables	standards@iso.org
ISO/IEC Directives and Consolidated ISO Supplement	directives@iso.org
Vienna Agreement	va@iso.org
Copyright and trademarks	logo@iso.org
Zoom and video/web conferencing	webconferencing@iso.org

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

- [ISO Templates](#)

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](#)
- [Registration Authority Policy](#) (see Annex H)
- [Systematic review](#)

ISO online

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

Annex A: Organizing and managing a meeting

Rules and procedures

Always consult the latest edition of the ISO/IEC Directives and Consolidated ISO Supplement for the most up-to-date rules and guidance on how to organize and manage an ISO meeting.

- ISO/IEC Directives, Part 1, Clause 4, “Meetings”
- Consolidated ISO Supplement, Annex SF, “Hosting meetings”

Most items in the table below are suggestions designed to help you with meeting preparation. The items in bold constitute requirements, as stated in the **ISO/IEC Directives Part 1 and Consolidated ISO Supplement**.

Additional considerations

- Consider scheduling/locating the meeting to coincide with an industry event or other committee or WG meeting. This may help to reduce travel costs and increase participation.
- Only call a physical meeting when it is absolutely necessary to discuss committee drafts or matters that cannot be settled by other means. For straightforward matters, we recommend using virtual meetings, which can save time and money as well as negative impact on the environment.

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

- “Strategic seating” is more possible in WG meetings than in committee meetings, so take advantage of this to seat participants in a way that will facilitate the meeting goals.

WG meeting: checklist planner

Advice on how to plan your meetings, see:

[Meeting time planner – ISO helpdesk knowledge base](#)

[Matching actions and meeting dates – STANDARDS Connect – ISO Connect](#)

NOTE: If a working group meeting is held in conjunction with the meeting of the parent committee, some of the below tasks will be performed by the Committee Manager. Be sure to coordinate with the parent committee secretariat for maximum efficiency. Many of these tasks can also be performed by the working group Secretary, if there is one.



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**.

*August 2023



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