

ISA Standards and Practices Department Procedures

2017 Revision

ANSI Approved

13 June 2017

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S&P Department Procedures

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53

54 **1 Introduction**

55 These written *ISA Standards and Practices Department Procedures* (hereafter known as the “*Procedures*”)
56 shall govern ISA Standards development and shall be available to any interested person. Supplemental
57 procedures developed by a Committee or subgroup for its work shall be reviewed by the ISA staff, to ensure
58 consistency with these *Procedures* prior to release of those supplemental procedures to the Committee or
59 subgroup for ballot.

60 **2 ISA Standards and Practices (S&P) Department**

61 ISA’s S&P Department (hereafter referred to as “the Department”) shall be responsible for preparing and
62 publishing ISA STANDARDS¹ that meet ISA and ANSI (American National Standards Institute) requirements for
63 due process and criteria for approval. The Department shall apply for and maintain ISA’s accreditation as an
64 ANSI Standards Developing Organization. The Department welcomes and greatly values the participation of
65 experts from across the globe in the development of ISA STANDARDS.

66 The Department strongly supports the development of international standards, including the identification and
67 adoption of international standards. This is an essential responsibility of ISA as an accredited standards
68 developing member organization of ANSI, and is completely consistent with and supportive of the
69 organizational goals of ISA as a leading international member association for automation professionals and
70 practitioners. The Department shall apply for and maintain a membership on the Technical Management
71 Committee of the United States National Committee of the International Electrotechnical Commission (IEC).

72 The Department shall endeavor to advocate the ISA position, including use of existing ISA STANDARDS, in
73 international standards development. Where appropriate and as resources allow, the Department shall
74 endeavor to provide administrative support to international Standards Committees and technical support to
75 individual experts serving in leadership roles on those Committees.

76 **2.1 Department organization**

77 The Department shall consist of an administrative body, the Standards & Practices Board, and operating
78 bodies, the Standards Committees. Both bodies shall be under the direction of the Department Vice
79 President, who administratively reports to the ISA Technical Assembly. The Standards program shall be
80 managed by the S&P Board and supported by volunteers who serve on Committees that are responsible for
81 standards development. The assistance in the coordination of the Department activities shall be provided by
82 ISA Headquarters staff assigned by the ISA Executive Director.

¹ Use of the term “ISA STANDARD(S)” in this document applies to ISA Standards, Recommended Practices, and Technical Reports, unless specifically noted otherwise. Definitions of these types of documents are as follows:

STANDARD: A document that embodies requirements (normative material) that, if not followed, could directly affect safety, interchangeability, performance, or test results. In general, such requirements should already be widely recognized and used. A standard may contain informative material as long as it is clearly identified as such.

RECOMMENDED PRACTICE: A document that embodies recommendations (informative material) that are likely to change because of technological progress or user experience, or which must often be modified in use to accommodate specific needs or problems of the user of the document.

TECHNICAL REPORT: A document that embodies informative material. For example, reports of technical research, tutorials, and factual data obtained from a survey, or information on the “state-of-the-art” in relation to standards on a particular subject.

83 **2.2 Department administration**

84 **2.2.1 Standards and Practices Board**

85 The Standards and Practices Board (hereafter referred to as “the Board”) shall be responsible for conducting
86 Department activities by providing policy, direction, and guidance to the Society Standards and Practices
87 Program, ISA staff, and the Standards Committees.

88 The Board shall be composed of the Department Vice President (Chair of the Board), the Department Vice
89 President-elect (Vice Chair of the Board), Managing Directors, Administrative Directors, Directors Emeritus,
90 and a senior staff member designated by the ISA Executive Director, who shall serve as a non-voting member
91 (Secretary of the Board).

92 By accepting membership on the Board, and as an ongoing condition for continuing to serve on the Board,
93 each Board member has understood and agreed that in the conduct of his or her responsibilities on the Board,
94 he or she will seek to act strictly in the best interests of ISA and the ISA Standards and Practices Department.
95 Should a Board member’s obligations to his or her employer or other external entities conflict with the interests
96 of ISA or the ISA Standards and Practices Department, the Board member shall disclose the conflict to the
97 Executive Committee of the Board (see final paragraph in this section) and offer to resign from the Board.

98 Managing and Administrative Directors, and Directors Emeritus are appointed to annual calendar year terms
99 by the Department Vice President subject to final approval by the ISA Board of Department Vice Presidents
100 (see Annex D). The number of Directors appointed to serve on the Board shall be at the discretion of the
101 Department Vice President. When making appointments of Directors, the Department Vice President should
102 consider the relevant experience with standards development activities and ISA Standards Committee work of
103 the candidate under consideration, as well as the ability of the candidate to devote the time necessary to fulfill
104 assigned responsibilities.

105 The Department Vice President shall appoint a Managing Director or two co-Managing Directors (hereafter
106 referred to as the “Managing Director”) for each Standards Committee. Managing Directors provide broad
107 oversight to each Committee, act as a resource to facilitate Committee success and to liaise with the Board,
108 and ensure that the assigned Committee functions within its scope and purpose as approved by the Board
109 (see section 4, fourth paragraph). When considering the appointment of individuals, the Vice President shall
110 endeavor to appoint a Managing Director who has no perceived conflict of interest pertaining to the standard to
111 be developed, to avoid any appearance of partiality. Managing Directors shall be appointed to each
112 Standards Committee for a calendar year term that renews automatically on 1 January of each year, unless
113 the Vice President decides not to renew the appointment. In that case, the Vice President shall inform the
114 Board of same and shall appoint a new Managing Director.

115 Administrative Directors act as resources in specialized areas of expertise to facilitate the conduct of Board
116 activities and overall ISA STANDARDS development.

117 Directors Emeritus are appointed based on prior distinguished service on the ISA Standards & Practices Board
118 and its committees, or because of special technical, geographic, or organizational expertise that is important to
119 the Board. This position will be appointed by the S&P Department VP, non-voting.

120 A majority of the Directors with voting status (Managing Directors plus Administrative Directors) constitutes a
121 quorum for conducting Board business at a meeting.

122 An Executive Committee of the Board is authorized to act for the Board between its regular meetings to carry
123 out the policies of the Board and shall be composed of three (3) to five (5) members. The membership shall
124 include the Vice President, the Vice President-Elect, the immediate Past Vice President, and up to two
125 additional members of the Board appointed by the Vice President.

126 **2.2.2 Consensus standard development method**

127 ISA is accredited to develop ISA Standards for submittal as proposed American National Standards, using its
128 ANSI-accredited operating procedures. ISA’s accreditation allows development of Standards under ISA
129 operating procedures. ISA Procedures define Main (oversight) Standards Committees for each major subject
130 area (hereafter referred to as “Committee”) responsible for establishing the need to develop, revise, reaffirm,

131 and recommend withdrawal of ISA STANDARDS in their assigned areas of responsibility, all subject to oversight
132 by the Board.

133 These Committees form the consensus bodies for standards developed under the ANSI Essential
134 Requirements and these ISA Procedures.

135 **2.2.3 Board voting**

136 All members of the Board shall have one vote on Board matters, with the exception that voting status on the
137 Board shall be limited to one per organization, company, or government agency. If distinct divisions of an
138 organization, company, or government agency can demonstrate independent interests and authority to make
139 independent decisions in Board matters, each may petition the Department Vice President for voting
140 membership.

141 The following require two-thirds approval of the total eligible voting members of the Board:

- 142 • changes to these Procedures (with subsequent ratification by majority vote of the ISA Technical
143 Assembly)
- 144 • initiating a new Committee
- 145 • approving a Standard with no unresolved negative votes if directed by the Vice President; such a
146 ballot addresses only whether ISA procedures were followed properly by the consensus body, and
147 does not address the technical merits of a Standard (which is the responsibility of the consensus body)
- 148 • approving a Standard that has unresolved negative votes; such a ballot addresses only whether ISA
149 procedures were followed properly by the consensus body, and does not address the technical merits
150 of a Standard (which is the responsibility of the consensus body).

151 The following require majority approval of the total eligible voting members on the Board:

- 152 • approving changes to the scope and purpose of a Committee
- 153 • changing the status of a Committee (see third paragraph, section 4)
- 154 • approving a joint committee agreement (see fourth paragraph, section 4)
- 155 • withdrawing a Standard when a Committee fails to comply with the periodic review of standards
156 procedures (see section 8.2)
- 157 • approving the submittal of an ISA STANDARD or draft STANDARD for adoption or development by
158 external organizations including but not limited to the IEC and ISO. Unless the Vice President directs
159 otherwise, this approval may be obtained by default ballot (such as in conjunction with the default
160 approval by the Board of an ISA STANDARD per section 5.2.10)
- 161 • approving the submittal of a STANDARD or draft STANDARD from external organizations including
162 but not limited to the IEC and ISO for adoption or development by ISA. Unless the Vice President
163 directs otherwise, this approval may be obtained by default ballot (such as in conjunction with the
164 default approval by the Board of an ISA STANDARD per section 5.2.10)
- 165 • approving agreements or memoranda of understanding between any entity of the S&P Department
166 and external organizations including but not limited to the IEC and ISO, any other matter on which the
167 Board votes that is not listed previously in this section, unless the Vice President directs that two-thirds
168 approval of the eligible voting members of the Board must be attained.

169

170 **3 Initiation of new ISA Standards development projects**

171 **3.1 Submission of new project proposals**

172 Written requests to initiate new ISA Standards development projects shall be submitted to the Secretary of the
173 Board, at ISA Headquarters, for referral to the Board. Requests shall be submitted on the New Standards
174 Project Proposal (NSP) form, available on the ISA Standards web page or from ISA staff. An NSP form
175 documents, among other items, the title and scope of the proposed work, its purpose and justification, and
176 relevant coordination with other standards work and committees. Review of individual proposals shall be
177 assigned to one or more Managing Directors for future study, followed by (a) assignment to an existing
178 Committee for review if the proposed project appears to fall within the scope of that committee; or (b)
179 formation of a survey committee (see 3.2 below); or (c) return with comments to the proposer if the proposed
180 project does not appear worthy of further investigation. Proposals for new projects that are generated within
181 an existing Committee and that fall within its Scope must be approved by a majority of the voting members of
182 that Committee for work to commence.

183 **3.2 Survey Committee review**

184 When a suggested project appears worthy of further investigation and does not fall within the scope of an
185 existing Committee, the Board may establish a Survey Committee to:

- 186 a) define the issue(s) to be addressed by the proposed project
- 187 b) determine whether development of ISA STANDARD(S) can address the issue(s)
- 188 c) identify the purpose and scope of the proposed ISA STANDARD(S)
- 189 d) determine priorities for the development of proposed ISA STANDARD(S)
- 190 e) determine if active volunteers are available and interested in staffing the proposed project
- 191 f) determine whether standards projects are already underway that address the scope of the proposed ISA
192 STANDARD(S), including a search of ISA, ANSI, and IEC/ISO for existing standards and works-in-progress
- 193 g) develop a schedule, if possible, for the development of the proposed ISA STANDARD(S)

194 The Survey Committee is not authorized to write or approve standards.

195 The Survey Committee shall make its final recommendations to the Department Vice President by submitting a
196 report. The recommendations of the Survey Committee (with supporting documentation, as appropriate) shall
197 include the demonstrated need and the economic impact to undertake the project with a proposed purpose
198 and scope; or, if the Survey Committee concludes that the project is inappropriate, a recommendation to
199 abandon any future activity. If development of a new standard is recommended, the Standards Projects
200 Proposal (NSP) Form documenting, among other items, the relationship with relevant national and
201 international standards, the relationship to other standards committees, and an impact assessment completed
202 by the ISA Standards Staff, shall be included with the recommendation.

203 The Survey Committee shall submit its final report to the Department Vice President who, upon acceptance of
204 the report, shall forward it to the Board for approval.

205 **3.3 New project approval**

206 A two-thirds vote of approval (of total eligible voting members) by the Board shall be required to initiate a new
207 Committee to develop the new project. Following Board approval, the Survey Committee shall be disbanded
208 and the Department Vice President shall appoint a Managing Director or two Co-Managing Directors (hereafter
209 referred to as the "Managing Director") to oversee the newly approved project.

210

211 3.4 Notification of standards development

212 Notification of standards activity shall be announced in suitable media as appropriate to demonstrate provision
213 of opportunity for participation by all directly and materially affected persons.

214 At the initiation of a new committee or of a project to develop or revise an ISA STANDARD as an American
215 National Standard, ISA shall notify ANSI by submitting an ANSI Project Initiation Notification System (PINS)
216 Form for listing in *ANSI Standards Action*. A statement shall be submitted by ISA Standards Staff and
217 published as part of the PINS announcement that shall include:

218 (a) an explanation of the need for the project; and

219 (b) identification of the stakeholders (e.g., power, process analysis, etc.) likely to be directly impacted by
220 the standard.

221 ISA shall seek to consult any relevant international or regional guides that may impact the proposed standard
222 and shall advise the relevant ANSI-Accredited U.S. TAG(s) if the standard is intended to be submitted for
223 consideration as an ISO, IEC or ISO/IEC JTC-1 standard. If the response to sub-section (b) changes
224 substantively as the standard is developed, a revised PINS shall be submitted by ISA Standards staff and
225 published. A PINS form may be submitted, but is not required, at the initiation of a project to reaffirm or
226 withdraw an American National Standard. Comments received in connection with a PINS announcement shall
227 be handled in accordance with these procedures.

228 If ISA receives written comments within 30 days from the publication date of a PINS announcement in
229 *Standards Action*, and said comments assert that a proposed ISA STANDARD duplicates or conflicts with an
230 existing American National Standard (ANS) or a candidate ANS that has been announced previously in
231 *Standards Action*, a mandatory deliberation of representatives from the relevant stakeholder groups shall be
232 held within 90 days from the comment deadline. Such a deliberation shall be organized by ISA and the
233 commenter and shall be concluded before ISA may submit a proposed standard for public review. If the
234 deliberation does not take place within the 90-day period and ISA can demonstrate that it has made a good
235 faith effort to schedule and otherwise organize it, then ISA will request to ANSI that ISA be excused from
236 compliance with this requirement. The purpose of the deliberation is to provide the relevant stakeholders with
237 an opportunity to discuss whether there is a compelling need for the proposed standards project. The
238 outcome of a PINS deliberation shall be conveyed in writing using the ANSI PINS Deliberation Report (sample
239 provided in "ANSI PINS Process: An Informative Summary (2013)") within 30 days after the conclusion of the
240 deliberation by ISA to the commenter and to ANSI. Upon submission of the Deliberation Report, ISA may
241 continue with the submission of the proposed standard for public review. If additional deliberations take place,
242 they should not delay the submission of the proposed standard for public review, and an updated Deliberation
243 Report shall be conveyed within 30 days after each deliberation. Any actions agreed upon from the
244 deliberations shall be carried out in a reasonably timely manner, but normally should not exceed 90 days
245 following the deliberation. Subsequently, ISA shall include all of the Deliberation Report(s) with the BSR-9
246 submittal to the ANSI Board of Standards Review (BSR) for consideration should ISA ultimately submit the
247 subject standard to ANSI for approval. Stakeholders who were involved in the PINS deliberation process may
248 also file separate Deliberation Report(s) with ANSI and ISA within 30 days after conclusion of any deliberation
249 for consideration by the BSR, if the standard is submitted to ANSI for approval.

250
251 In addition, proposals for new American National Standards and proposals to revise, reaffirm, or withdraw
252 approval of existing American National Standards developed by ISA shall be transmitted to ANSI using the
253 BSR-8 form, or its equivalent, for listing in *Standards Action* in order to provide an opportunity for public
254 comment. If it is the case, then a statement of intent to submit the standard for consideration as an ISO, IEC or
255 ISO/IEC JTC-1 standard shall be included as part of the description of the scope summary that is published in
256 *Standards Action*. The comment period shall be one of the following:

257
258 • A minimum of 30 days if the full text of the revision(s) can be published in *Standards Action* (on a five-
259 page pdf file);

260 • A minimum of 45 days if the document is available in an electronic format, deliverable within one day
261 of a request, and the source to obtain the document (e.g., e-mail address) from which it can be
262 obtained by the public is provided to ANSI for the *Standards Action* announcement; or

- 263 • A minimum of 60 days, if neither of the above options is applicable. If requested by an interested party
264 within the territory of a Member of the World Trade Organization (WTO), ISA shall allow a period of at
265 least 60 days in total for submission of comments on the draft ISA STANDARD prior to adoption.
266 Although a 60-day public comment period is not required in all instances, a number of provisions in the
267 *ANSI Essential Requirements*, when read in combination, satisfy the WTO's 60-day rule (i.e., through
268 submission of the PINS and BSR-8 forms to ANSI). For more information, see the *WTO Agreement on*
269 *Technical Barriers to Trade (TBT), Annex 3 Code of Good Practice for the Preparation, Adoption and*
270 *Application of Standards (CGP) Substantive Provision L.*

271 Such listing may be requested at any stage in the development of the proposal, at the option of ISA, and may
272 be concurrent with final balloting. However, any substantive change subsequently made in a proposed
273 American National Standard requires listing of the change in *Standards Action*.

274 3.5 Discontinuance of a standards project

276 ISA may decide to abandon the processing of a proposed new or revised ISA Standard or portion thereof at its
277 own discretion and without a vote of the relevant Committee.

278 ISA must notify ANSI immediately of such actions which will be announced in Standards Action.

279 4 ISA Standards Committee governance

280 ISA Standards Committees form the consensus bodies for standards developed under the ANSI Essential
281 Requirements.

282 A Committee shall have a title, and a Scope and Purpose. The Scope and Purpose of a new Committee, and
283 any changes thereafter, shall be approved by a majority vote of the total eligible voting members of the Board.
284 Upon approval of the Committee Scope and Purpose by the Board, the Committee functions as a Board-
285 approved ISA Standards Committee (hereafter known as the "Committee").

286 If the Committee fails to function or fulfill its responsibilities according to the Procedures or if the Committee
287 actions are not in the best interests of the Department and ISA, the Board may vote with approval by a
288 majority to change the Committee status, including but not limited to suspending Committee activity,
289 disbanding the Committee and reassigning work activities to another Committee, replacing Committee leaders
290 and members, or terminating the work of the Committee.

291 A major responsibility of managing directors and committee chairs is to ensure that a committee functions
292 within its scope and purpose as approved by the Board. When the scope and purpose of a committee or
293 subgroup has been determined by the managing directors to overlap with those of another committee or
294 subgroup, the managing directors of the relevant committees shall provide a joint committee agreement for
295 approval by a majority of the Board. The joint committee agreement may include:

296 a) the appointment of liaison between relevant committees or subgroups,

297 b) the formation of a subgroup within one committee, with membership open to members of both of the
298 relevant committees, or

299 c) the formation of a joint subgroup between the relevant committees.

300 4.1 Committee composition

301 Each Committee organization shall consist of a Chair or two Co-Chairs (hereafter referred to as the "Chair")
302 and members who have a direct and material interest in the activities of the Committee. The membership of
303 the Committee consists of voting and information (non-voting) members.

304

305 Voting or information membership on the consensus body shall not be conditional upon membership in any
306 organization including ISA, nor unreasonably restricted on the basis of technical qualifications or other such
307 requirements.

308 The voting membership shall be sufficiently diverse to ensure reasonable balance without dominance by a
309 single interest category, individual or organization. The minimum number of voting members to have a viable
310 Committee shall be five.

311 **4.2 Officers**

312 The Committee Managing Director shall appoint a Chair for a new Committee. For an existing Committee, the
313 Committee Managing Director shall appoint a Chair from the individual members of the Committee. When
314 considering the appointment of individuals, the Committee Managing Director shall endeavor to appoint a
315 Chair who is likely to be perceived by the members as fair and impartial. Chairs automatically hold voting
316 membership status on the Committee.

317 Each Committee Chair is appointed for a term that, unless decided otherwise by the responsible Managing
318 Director, renews automatically on 1 January of each year. If the current Chair's appointment is not to be
319 renewed, the responsible Managing Director shall inform the Board of same, shall inform the current Chair that
320 the appointment as Chair is not being renewed, and shall then appoint a new Chair as described in the
321 preceding paragraph.

322
323 The Committee Chair may appoint one or more Vice Chairs (hereafter known as the "Vice Chair"). The duties
324 of the Vice Chair shall be as agreed between the Chair and Vice Chair. The Vice Chair (or one of the Vice-
325 Chairs designated by the Chair) shall carry out the Chair's duties if the Chair is temporarily unable to do so or
326 in an interim period while a new Chair is being appointed by the responsible Managing Director. A Vice Chair
327 shall serve at the pleasure of the Chair, but shall have a term that renews automatically on 1 January of each
328 year unless the Committee Chair decides not to renew the appointment. In that case, the Committee Chair
329 shall inform the Vice Chair that the appointment as Vice Chair is not being renewed, and may then appoint a
330 new Vice Chair with another specific agreement of duties.

331 A Committee Secretary (hereafter known as the "Secretary") may be appointed by the Committee Chair. The
332 Secretary shall serve a term that renews automatically on 1 January of each year, unless the Committee Chair
333 decides not to renew the appointment. In that case, the Committee Chair shall inform the Secretary that his or
334 her appointment as Secretary is not being renewed, and shall then appoint a new Secretary from the individual
335 members of the Committee. The duties of the Secretary shall be as agreed between the Chair and Secretary

336 **4.2.1 Officer responsibilities**

337 Officer duties and responsibilities shall include but not be limited to the following items (these same duties
338 apply to officers of subgroups):

339 The Chair shall lead the participants according to all of the relevant policies and procedures and shall

- 340 a) Be objective
- 341 b) Entertain motions, but not make motions
- 342 c) Not bias discussions
- 343 d) Delegate necessary functions
- 344 e) Ensure that all parties have the opportunity to express their views
- 345 f) Set goals and deadlines and adhere to them
- 346 g) Be knowledgeable in ISA standards processes and parliamentary procedures and ensure that the
- 347 processes and procedures are followed
- 348 h) Seek consensus as a means of resolving all issues
- 349 i) Prioritize objectives to best serve the group and the goals
- 350 j) Monitor to ensure that his or her committee operates within its scope and purpose as approved by the
- 351 Board, taking action as needed to comply with Section 4, fourth paragraph.

352
353 The Vice-Chair shall carry out the Chair's duties if the Chair is temporarily unable to do so or chooses to
354 recuse himself or herself (i.e., to give a technical opinion).

355
356

- 357 The Secretary's duties may include:
- 358 a) Distribute the agenda before meetings
 - 359 b) Record and publish minutes of each meeting
 - 360 c) Create and maintain the voting membership roster in collaboration with ISA staff
 - 361 d) Schedule meetings in coordination with the Chair
 - 362 e) Maintain lists of unresolved issues, action items, and assignments

363 4.2.2 Interest categories

364 All appropriate interests that might be directly and materially affected by the standards activity of the
365 Committee shall have the opportunity for fair and equitable participation without dominance by any single
366 interest category, individual, or organization. Each voting member of the Committee shall propose his or her
367 own interest category as appropriate and in accordance with the categories listed in this section, subject to
368 agreement with the Committee Chair on that proposed interest category; and shall immediately notify the
369 Committee Chair and ISA staff if his or her interest category changes. If a voting member and the Chair do not
370 agree on the proposed interest category, the Chair may either accept the proposed category or request that
371 the Managing Director of the committee determine the interest category of the individual.

372 Interest categories for voting members of the Committee shall include:

- 373 a) User – Individuals who are involved in using the type of product that is the topic of the standard, but who
374 are not involved with the production or distribution of that type of product.
- 375 b) Producer – Individuals who are involved in the production of the type of product. This includes individuals
376 involved in the design, engineering support, manufacturing, testing, and/or marketing of the type of
377 product; and who are employed by or represent a producer (manufacturer/vendor) of the type of product.

378 **Note:** A person who works for a company that purchases the product that is the subject of the
379 standard and then transfers ownership of the product or an assembly that includes the product to an
380 end user is not to be classified as a user.
- 381 c) Regulatory/Government – Individuals who represent governmental entities having regulatory interest in or
382 influence over the type of product.
- 383 d) Testing/Certification/Approval – Individuals who represent organizations that provide testing, certification,
384 and/or approval of the type of product.
- 385 e) Architect-Engineer, Engineer-Constructors, Integrators – Individuals employed by organizations involved
386 with the design of systems or facilities in which the type of product is used, including application
387 engineering and engineering support for installation and use of the type of product.
- 388 f) General – Individuals who do not meet any of the preceding interest categories. This may include, but is
389 not limited to, experts from academia, professional associations, and experts who are retired or do not
390 receive funding for their standards activities from any related organization.

391 **Note:** Individuals who might normally be classified as General per this definition could in some cases
392 be classified more properly as one of the other categories, depending on their funding/support or other
393 business arrangements pertaining to the type of product that is the topic of the standard in
394 development. For example, a university professor who receives funding from a user company to serve
395 on a standards committee should be classified as a user.

396 4.2.3 Standards identified as primarily safety related

397 In accord with the Essential Requirements of the American National Standards Institute, the Managing Director
398 of a committee shall identify those ISA STANDARDS in development by that committee that are primarily safety
399 related and shall notify the Board in writing of same at least annually.

400

401 **4.2.4 Disclosure of affiliation**

402
403 Each consensus body voting member's affiliation and resulting interest category shall be disclosed at all times,
404 including at all meetings. The Chair shall inform the meeting of the requirement for disclosure of affiliation.
405 This shall be via a sign-in (e.g., sign-in sheet, electronic sign-in, verbal disclosure, or electronic
406 communication) that provides for disclosure of employer and any other affiliation, a reminder of the definition of
407 affiliation, and possible penalties for non-compliance.

408
409 Whenever an individual is aware that the ownership of his or her employer or other affiliation may be material
410 to the process, that individual shall also declare the "ultimate parent entity" of his or her affiliation. The ultimate
411 parent entity is an entity that directly or indirectly, through one or more intermediaries, controls the entity
412 identified as the individual's affiliation. For the purposes of this definition, the term "control" and its derivatives,
413 with respect to for-profit entities, means the legal, beneficial or equitable ownership, directly or indirectly, of
414 more than fifty percent (50%) of the capital stock (or other ownership interest, if not a corporation) of an entity
415 ordinarily having voting rights. "Control" and its derivatives, with respect to nonprofit entities, means the power
416 to elect or appoint more than fifty percent (50%) of the Board of Directors of an entity.

417
418 The minutes of each meeting shall record a list of attendees and the disclosed affiliation of each attendee.

419
420 A consensus body voting member who fails to disclose affiliation shall not accrue any membership rights,
421 including rights of or towards voting membership, until such disclosures have been made. The Chair shall
422 review the adequacy of disclosures. Failure to disclose affiliation, or materially false or misleading disclosure of
423 affiliation, shall result in loss of membership privileges and may also result in loss of other participation
424 privileges for such participants and any affiliated entities.

425
426 The Chair shall, when appropriate, review the adequacy of disclosures and, if deemed inadequate, may direct
427 corrective action(s). In the absence of effective corrective action(s) by the Chair, the Board may impose further
428 corrective action(s).

429
430 **4.3 Members**

431 A Committee may have both voting and non-voting members.

432 **4.3.1 Voting members**

433 Upon initial formation of a Committee, the Committee Chair shall appoint the initial voting members consistent
434 with requirements of balance of interest categories. The initial voting membership of a new Committee shall be
435 submitted to the Managing Director for approval to ensure that due process requirements have been satisfied.

436 For existing Committees, approval of new voting members requires approval by a majority of the members of
437 the Committee. Unless the Chair directs otherwise, this action may be conducted using a default approval
438 electronic ballot, wherein an approval vote is assumed for each voting member of a committee who does not
439 submit a disapproval vote or abstention within a designated period of time.

440 New voting members shall have voting rights commencing with ballots that are issued subsequent to the time
441 of their approval as a voting member.

442 Applications for voting membership shall be submitted to the Committee Chair. Applications should include
443 the applicant's qualifications, direct and material interest in the Committee's work, proposed interest category,
444 commitment to participate actively, and an alternate if desired.

445 The Committee Chair is responsible for recommending appropriate action to the Committee on applications for
446 voting membership. An application for voting membership shall not be submitted to the Committee for action if
447 the Chair believes that an applicant does not meet necessary criteria. In considering applications for voting
448 membership, the Chair may consider the following factors:

- 449
- the need for active participation by each interest

- 450 • the potential for dominance or imbalance by a single interest category or organization
- 451 • the extent of interest expressed by the applicant and the applicant's commitment to participate
452 actively, including previous contributions to ISA STANDARDS development
- 453 • the qualifications of the representative (and the alternate if proposed) including but not limited to
454 technical expertise, experience in building consensus, and knowledge of the industry
- 455 • reasonable limits on Committee size to permit efficient functioning while still maintaining required
456 interest category balance (for example, committees larger than 50 voting members could be difficult to
457 administer efficiently)

458 Diverse Interests: If distinct divisions of an organization, company, or government agency can demonstrate
459 independent interests and authority to make independent decisions in the area of the activity of the
460 Committee, an individual from each may apply for voting membership. Otherwise, voting membership shall be
461 limited to one per organization, company, or government agency.

462 Combined Interest: When appropriate, the Committee Chair may recommend that the voting applicant seek
463 representation through an organization from which a voting member already exists and that represents the
464 same or similar interests. Such instances and the reasons for same shall be documented.

465 A voting member who becomes no longer qualified as defined in this section may be changed to information
466 member status by the Chair following the process set forth in the third paragraph of section 4.3.3.
467

468 **4.3.2 Information members**

469 Individuals and organizations having an interest in the Committee's work may request to ISA Standards staff
470 that they be listed as information members (sometimes called observers) of the Committee. Information
471 members shall be advised of the Committee activities, may attend meetings, and may submit comments for
472 consideration, but shall have no vote.

473 **4.3.3 Review of membership**

474 The Chair shall review the membership list at least annually with respect to due process using a roster
475 maintained and provided by ISA staff. Voting members shall fulfill obligations of Committee participation.
476 Voting members shall have electronic document handling and communication capability to fulfill voting
477 membership responsibilities.

478 While participation by all interested parties is encouraged and welcomed, voting members are expected to
479 participate at least three times during each calendar year or to contribute significantly to the work of the
480 committee in some other way as recognized by the Chair, such as providing technical content to proposed
481 documents. Participation is defined as attending a significant portion of a meeting (or teleconference) of the
482 committee.

483 When a voting member is found in default of these obligations, the Chair may elect to inform the individual that
484 she or he is being changed to information status on the committee, but may apply for voting membership again
485 after an elapsed period of twelve months after revocation of voting membership status. If the individual does
486 not agree to this change of status, the Chair may direct that the Committee be balloted on whether to change
487 the individual's status from voting membership to information membership.

488 Voting members are expected especially to return votes on all letter ballots submitted to the Committee.
489 Failure by a voting member to submit a vote on any two non-default ballots in a calendar year, based on the
490 closing dates of the ballots, shall result in an automatic change in status from voting membership to
491 information membership at the close of the second missed non-default ballot, until compelling rationale is
492 provided to and approved by the Chair as a basis for a reinstatement of the member's voting status.
493 Individuals may apply for voting membership again after an elapsed period of twelve months after revocation
494 of voting membership status.

495 Committees may adopt more stringent requirements to define “participation” upon approval by two-thirds of the
496 voting members of that Committee and subsequent approval by the Managing Director.

497 **4.3.4 Membership roster**

498 The Chair, in conjunction with assigned ISA staff, shall maintain a current and accurate Committee Roster,
499 which will be readily available to Committee members via electronic posting and/or distribution. The roster
500 shall include the Committee Title, Scope and Purpose, Officer names, and Committee Member names with
501 voting status.

502 **4.3.5 Members' responsibilities**

503 It is a condition of membership that each Committee Voting and Information member complies with all
504 membership requirements as defined by ISA procedures and guidelines, acting at all times in a professional
505 and collegial manner striving for consensus and following the ISA Standards Code of Conduct (Annex A).
506 Failure to fulfill these responsibilities is the basis for removal from Committee membership by mutual
507 concurrence and action of the Chair and Managing Director. Should such action be taken, a means of appeal
508 is provided in Annex B.

509 The Committee Voting members shall be responsible for

510 a) developing proposed ISA STANDARDS within the Scope and Purpose of the Committee

511 b) voting on proposed ISA STANDARDS within the Scope and Purpose of the Committee

512 c) maintaining and updating the ISA STANDARDS developed by the Committee in accordance with
513 section 8, *Maintenance of standards*

514 d) responding to requests for interpretations of ISA STANDARD(s) developed by the Committee, per the
515 procedures of Annex C.

516 e) considering and acting on proposals for termination of the Committee

517 f) adding or terminating voting members recommended by the Chair

518 g) other matters requiring Committee action

519 **4.4 Committee subgroups**

520 **4.4.1 Forming subgroups**

521 A Committee may form subgroups to facilitate the conduct of its work. The subgroups may be called
522 subcommittees, working groups, task groups, or similar such titles. Secondary subgroups formed by
523 subgroups reporting directly to the Committee are subject to oversight by their parent body (e.g., Committee
524 for a working group or subcommittee established by the Committee; and working group or subcommittee for a
525 task group established by a working group or subcommittee). Unless otherwise stated the procedures
526 governing quorum and voting described for Committees shall also apply to subgroups.

527 When one or more subgroups are formed to expedite the work of the Committee, their formation (and later
528 disbandment) requires approval by a majority vote of the parent body. Unless the Chair directs otherwise, this
529 action may be conducted using a default approval electronic ballot, wherein an approval vote is assumed for
530 each voting member who does not submit a disapproval vote or abstention within a designated period of time.

531 The duties delegated to the subgroup, and the rules and procedures under which it functions, and subsequent
532 changes to same, shall be approved by a majority vote of the voting members of the parent body. Unless the
533 Chair directs otherwise, this action may be conducted using a default approval electronic ballot, wherein an
534 approval vote is assumed for each voting member who does not submit a disapproval vote or abstention within
535 a designated period of time.

536 Subgroups which conduct formal ballots of their work activities shall consist of voting and information
537 members, but with no balance of interest category requirements. Voting members shall be limited to one per
538 affiliation. Subgroup quorum requirements shall be consistent with those for the Committee as outlined in
539 section 5.1.3. Rosters of such voting subgroups shall be maintained as is done for Committees. Subgroup
540 voting procedures shall be consistent with those for the Committee as outlined in sections 5.2.3, 5.2.4, and
541 5.2.5.

542 **4.4.2 Subgroup chair and members**

543 The subgroup Chair and voting members of a subgroup shall be appointed by the Chair of the parent body and
544 confirmed by majority vote of the parent body. Unless the Chair directs otherwise, this action may be
545 conducted using a default approval electronic ballot, wherein an approval vote is assumed for each voting
546 member who does not submit a disapproval vote or abstention within a designated period of time.

547 The subgroup Chair shall serve a term that renews automatically on 1 January of each year, unless the Chair
548 of the parent body decides not to renew the appointment. In that case, the Chair of the parent body shall
549 inform the subgroup Chair that his or her appointment as subgroup Chair is not being renewed, and shall then
550 appoint a new subgroup Chair from the individual members of the subgroup, subject to approval by a majority
551 vote of the voting members of the parent body. Unless the Chair directs otherwise, this action may be
552 conducted using a default approval electronic ballot, wherein an approval vote is assumed for each voting
553 member who does not submit a disapproval vote or abstention within a designated period of time.

554 **4.4.3 Approval of standards**

555 Proposed ISA STANDARDS and any substantive revisions to ISA STANDARDS that are proposed by a subgroup
556 shall be referred to the Committee for approval. The Committee serves as the consensus body for the
557 approval of all ISA STANDARDS.

558 **5 Committee administration**

559 **5.1 Meetings**

560 **5.1.1 Scheduling**

561 Authorization for meetings shall be determined by the Committee Chair, or by petition of 20% of the voting
562 members of the Committee or five (5) voting members of the Committee, whichever is greater, submitted to
563 and approved by the Chair to conduct business (e.g., assign and review work assignments, consider ISA
564 STANDARDS' drafts, resolve differences among subgroups, and consider views and objections from any
565 source). Meetings of subgroups may be held as decided upon by the Chair of the subgroup, and are open to
566 all interested parties. Committee meetings shall be open to all members and others having direct and material
567 interest.

568 **5.1.2 Notification**

569 Notice of regularly scheduled meetings shall be given by the Committee to all Committee members and others
570 expressing interest, and, if appropriate, to media designed to reach directly and materially affected interests.
571 The notice shall describe the purpose of the meeting and shall identify a readily available source for further
572 information. An agenda shall be available and distributed in advance of the meeting to members and to others
573 expressing interest. For physical meetings, notice of the meeting should be made a minimum of 30 days in
574 advance and the agenda should be made available a minimum of seven (7) days in advance of the meeting
575 date. For electronic meetings, notice of the meeting should be made a minimum of seven (7) days in advance
576 and the agenda should be made available a minimum of two (2) business days in advance of the meeting
577 date.

578

579 **5.1.3 Quorum**

580 A majority of the total eligible voting members of the Committee present shall constitute a quorum for
581 conducting business at a meeting. If a quorum is not present, actions may be taken subject to confirmation by
582 letter ballot, equivalent recorded vote such as an e-mail ballot or voice vote during a conference call, or other
583 methods indicated in sections 5.2.3 and 5.2.4. In letter or email ballots, a quorum is established if a majority of
584 the total eligible voting members of the Committee cast a ballot.

585 **5.2 Voting rules**

586 **5.2.1 General**

587 Each voting member shall have one vote. An alternate's vote is counted only if the principal representative
588 fails to vote.

589 Each designated voting member or Committee-approved designated alternate shall be entitled to vote on
590 documents, as follows:

591 a) APPROVE (with or without technical or editorial comments)

592 b) DISAPPROVE, with justification (the specific paragraph, section, or parts of the document to which the
593 disapprove pertains, the technical reasons for the vote, and the specific wording or actions that would
594 resolve the technical objection shall be included)

595 c) ABSTAIN (with reasons)

596 A Disapprove ballot without technical justification does not need to be responded to (although it still counts as
597 a negative ballot). An abstention shall not be counted in the total vote. An alternate vote shall be counted only
598 if the principal representative fails to vote. No representative or organization shall have more than one vote.

599 A voting member who does not vote shall be recorded as NOT VOTING. This failure to vote does not count in
600 the determination of a quorum.

601 For votes on membership and officer-related issues, the YES/NO/ABSTAIN/NOT VOTING method of voting
602 shall be followed, with no comments required for NO votes. Unless the Chair directs otherwise, this action may
603 be conducted using a default approval electronic ballot, wherein an approval vote is assumed for each voting
604 member who does not submit a disapproval vote or abstention within a designated period of time

605 **5.2.2 Voting period**

606 The voting period for Committee ballots on proposed standards, recommended practices, and technical
607 reports shall be at least four (4) weeks from the date of issue, ending at 7:00 pm Eastern US time on the final
608 day, or when all ballots are returned, whichever comes earlier. Ballots not received by ISA as of the deadline,
609 for any reason, will not be counted. An extension of the voting period may be granted by the Chair before or
610 after the deadline, when warranted. A reminder letter or other notice requesting immediate return of the ballot
611 should be sent by ISA staff ten days prior to the close of the ballot to voting members whose votes have not
612 yet been received. Following the close of balloting, the ISA staff support person shall forward a ballot tally to
613 the Chair of the Committee or, if appropriate, of the subgroup; the Chair shall share the expressed votes,
614 views, and objections with the full Committee.

615 The voting period for Committee ballots on items other than proposed standards, recommended practices, or
616 technical reports shall be 14 days, ending at 7:00 pm Eastern US time on the fourteenth day, unless the Chair
617 directs that a different voting period be used.

618 **5.2.3 Actions requiring approval by a majority of the voting members of the Committee who cast a**
619 **vote**

620 The following actions require approval by a majority of the voting members of the Committee casting a vote
621 via: a) a hand count at a properly constituted meeting with a quorum present; or b) on a letter ballot or

622 equivalent recorded vote such as an e-mail ballot or roll call voice vote during a conference call with a quorum;
623 or c) as otherwise indicated below.

624 a) Forming a subgroup, including its procedures, scope, and duties

625 b) Disbanding a subgroup

626 c) Approving new projects within the Committee's scope

627 d) Adopting Committee procedures or revisions thereof not otherwise in conflict with these Procedures

628 e) Adding new Committee voting members or alternates for Committee voting members;

629 f) Changing the status of a Committee voting member to that of information member (other than by
630 resignation), when recommended by the Chair (see section 4.3.3, third paragraph)

631 g) Approving minutes.

632 Unless the Chair directs otherwise, each of the actions in this section may be conducted using a default
633 approval electronic ballot, wherein an approval vote is assumed for each voting member who does not submit
634 a disapproval vote or abstention within a designated period of time.

635 **5.2.4 Actions requiring approval by a majority of the total eligible voting members of the Committee**

636 The following actions require a letter ballot or equivalent ballot issued to all eligible voting members of the
637 Committee, with a majority of the total eligible voting members responding with an "APPROVE" vote.

638 a) Approving a new ISA Technical Report or Recommended Practice, or reaffirming or withdrawing an
639 existing ISA Technical Report or Recommended Practice.

640 **5.2.5 Actions requiring approval by greater than a majority of the Committee**

641 The following actions require a ballot distributed via mail, email, or web system issued to all eligible voting
642 members of the Committee, with (1) a majority of the total eligible voting members responding and (2) two-
643 thirds approval of those responding excluding abstentions.

644 a) Approving a new ISA STANDARD, or reaffirming or withdrawing an existing STANDARD

645 b) Approving a revision or addendum to part or all of an ISA STANDARD

646 c) Approving a recommendation to change the Committee scope

647 d) Approving a recommendation to terminate the Committee

648 **5.2.6 Authorization of a letter ballot**

649 A letter ballot or equivalent formal recorded vote may be authorized by any of the following:

650 a) Majority vote of the voting members present at a properly constituted Committee meeting.

651 b) The Chair, the Managing Director, or the Board

652 c) Petition of 20% of the voting members of the Committee or, five (5) voting members of the Committee,
653 whichever is greater, submitted to and approved by the Chair.

654

655 **5.2.7 Comments**

656 Prompt consideration shall be given to the expressed views and comments of Committee members and ANSI
657 Public Review commenters, whether arising in meetings or letter ballots. A concerted effort to resolve all
658 expressed comments shall be made, and each objector shall be advised in writing of the disposition of the
659 objection and the reasons therefore.

660 Substantive changes and unresolved objections along with attempts at resolution, shall be reported in writing
661 via email or other electronic means to the Committee voting members to afford each voting member an
662 opportunity to respond, reaffirm, or change his or her vote. The circulation period in this situation shall be
663 determined by the Chair, but shall be at least 14 days.

664 All comments shall be considered and responded to before a ballot is considered to have been approved by
665 the committee. The chairman of the appropriate committee, in conjunction with the committee members or a
666 designated subgroup, when appropriate, is responsible for the consideration of and response to ballot
667 comments pertaining to technical, safety, or environmental assertions and assertions of ambiguity, inaccuracy,
668 or omission. ISA staff is responsible for the consideration of and response to ballot comments pertaining to
669 ISA policies and procedures.

670
671 Comments shall be considered and responded to in one of the following ways:

- 672
- 673 a. Comments with affirmative ballots or from Information members or ANSI Public Review commenters,
674 that are determined to be persuasive and editorial; the proposed editorial changes are incorporated
675 into the document. The disposition of these comments shall be communicated in writing or through
676 electronic communications to the submitter.
677
 - 678 b. Comments with affirmative ballots or from Information members or ANSI Public Review commenters,
679 that are determined to be persuasive and substantive; the proposed substantive changes are
680 rebaloted for approval by the appropriate committee or consensus group prior to incorporation into the
681 document. The disposition of these comments shall be communicated in writing or through electronic
682 communications to the submitter.
683
 - 684 c. Comments with affirmative ballots or from Information members or ANSI Public Review commenters
685 that are determined to be nonpersuasive are not considered further, but will be made available for the
686 information of all committee members. The disposition of these comments shall be communicated in
687 writing or through electronic communications to the submitter and, in the case of objecting comments,
688 shall include notice of the right to appeal.
689
 - 690 d. Comments with negative ballots determined to be persuasive and substantive; the proposed
691 substantive changes are rebaloted for approval by the appropriate committee or consensus group
692 prior to incorporation into the document.
693
 - 694 e. Comments with negative ballots determined to be nonpersuasive are not considered further. The final
695 disposition of these comments shall be communicated in writing or through electronic communications
696 to the voter and shall include notice of the right to appeal. The nonpersuasive objection shall also be
697 recirculated to the consensus body, offering voting members the opportunity to respond, reaffirm, or
698 change their votes.
699
 - 700 f. Comments with negative ballots that are determined to be (1) unrelated to the item being balloted or
701 (2) negative ballots submitted without comments, shall not be considered further and will be recorded
702 as "negatives without comments" for purposes of reporting to ANSI with no further notice to the
703 submitter. In the first case, the commenter should be referred to the New Standards Project Proposal
704 form available on the ISA web site for possible submission of a new proposal for consideration by the
705 Board.
706
 - 707 g. Comments with negative ballots may be withdrawn by the voter after consultation with the chairman or
708 the designated subgroup and changed in writing or through electronic communications by the voter to
709 either an abstention or an affirmative.
710

711 Consideration given to all negative ballots, including an explanation of resolution decisions, shall be
712 documented in meeting notes, minutes, or other records and submitted to ISA.

713

714 **5.2.8 Substantive changes**

715 Substantive changes in a proposed ISA STANDARD are those that directly and materially affect the use of the
716 STANDARD. Examples of substantive changes are listed below.

717 a) "Shall" to "should"; "should" to "shall"

718 b) Addition, deletion, or revision of requirements, regardless of the number of changes

719 c) Addition or withdrawal of mandatory compliance with referenced standards

720 **5.2.9 ANSI Public Review for proposed American National Standards**

721 Notice of final actions on new ANSI/ISA STANDARDS and reaffirmations, revisions, or withdrawals of existing
722 ANSI/ISA STANDARDS shall be transmitted to ANSI for listing in *ANSI Standards Action* for ANSI Public Review
723 comment, and should be announced in ISA and other appropriate publications and information outlets. Public
724 review of Recommended Practices and Technical Reports shall not be required.

725 Unless the Chair directs otherwise, listing in *ANSI Standards Action* should be concurrent with the final
726 Committee letter ballot, as should announcement in other suitable media as appropriate. ISA staff is
727 encouraged to transmit a copy of the proposed new, revised, or reaffirmed ANSI/ISA STANDARD to the
728 Administrator(s) of the appropriate U.S. National Technical Advisory Group(s) (TAGs) at the same time.

729 If any substantive change is made to the ANSI Public Review draft of the proposed ANSI/ISA STANDARD, the
730 proposed STANDARD shall be resubmitted for Committee vote and to the same review process as originally
731 used. This may occur concurrently. It is acceptable for the Chair to direct ISA staff to recirculate a letter ballot
732 that includes the substantive changes, unresolved objections and attempts at resolution, giving each voting
733 member the right to respond, reaffirm, or change his or her vote. The circulation period for this situation shall
734 be determined by the Chair, but shall be at least 14 days. Alternately, the Chair may direct that a new letter
735 ballot be conducted.

736 Following final disposition of views and objections, the result of the voting shall be reported to the Committee
737 and Managing Director. Any comments received subsequent to the closing of the public review and comment
738 period may be held for the next revision.

739 **5.2.10 Final approval**

740 The following three paragraphs of this section apply only to Standards, and not to Recommended Practices
741 and Technical Reports.

742 A proposed Standard which received no Committee or ANSI Public Review negative comments or which has
743 no outstanding negative votes or comments (i.e., the voter or commenter has changed their position to Abstain
744 or Approve) will be sent electronically to the Board on a 10-day default ballot (to expedite approval). If Board
745 members approve that the procedures have been followed, then no reply to the ballot is necessary. If there
746 are any objections, then a ballot will be sent to the Board seeking approval by two-thirds of the total eligible
747 voting members. If this Standard is to be ANSI-approved, ISA staff submit the BSR-9 form to ANSI providing
748 all of the required accompanying material.

749

750 If there are unresolved negative comments on a draft Standard, those comments, and the Committee action to
751 resolve those negatives, will be sent by ballot to the Board. Any objector with unresolved comments from the
752 committee ballot process or the ANSI public review shall be informed in writing (which may include electronic
753 communications) that an appeals process, as provided in section 9, exists. All information regarding any
754 appeal prior to Board balloting shall be provided to the Board. The vote of the Board (approval by two-thirds of
755 the total eligible voting members) is to confirm that proper procedures were followed in addressing the
756 negatives. Upon Board approval, ISA staff will publish the document and, if this is to be an ANSI-approved
757 document, will submit the BSR-9 form to ANSI providing all of the required accompanying material.

758 In those instances where ISA cannot complete the approval process and submit the BSR-9 form to ANSI
759 within a year following the close of the ANSI public review period, an extension may be requested from ANSI
760 using the appropriate section of the BSR-11 form.

761 Unless directed otherwise by the Managing Director of the Committee, the 10-day default ballot process
762 described in this section will be used to seek Board approval of all proposed Recommended Practices and all
763 proposed Technical Reports. The appeal process provided in section 9 does not apply to Recommended
764 Practices and Technical Reports, which are not normative documents and are not issued for ANSI Public
765 Review.

766 Recommended Practices are not an ANSI document type.

767 Technical Reports may be submitted to ANSI for registration as an ANSI Technical Report. Prior to registration
768 of a Technical Report with ANSI, a 30-day announcement of the intent to register the report shall be placed in
769 ANSI Standards Action. A PSA-01 form shall be used to initiate both the announcement in Standards Action
770 and ANSI registration. Parties interested in further information will be instructed to contact ISA. Immediately
771 following the close of the announcement of the intent to register, the technical report shall be registered with
772 ANSI.

773 **5.3 Communications**

774 Electronic media are the principal methods of communication among Committee members.

775 **5.3.1 Minutes**

776 Minutes shall be kept by the Secretary or other officer of all Committee meetings (and are recommended for all
777 subgroup meetings). The minutes shall be reviewed by ISA staff to ensure compliance with these *Procedures*
778 and Society Policy prior to approval by the Committee.

779 **5.3.2 Written communications**

780 Written correspondence, in paper or electronic format, of an official ISA nature by Committee officers shall be
781 copied to ISA staff, and shall indicate clearly by the signature and content that the Committee officer is
782 communicating in his or her role on the Committee, and not in his or her role as an employee or representative
783 of an entity outside of ISA.

784 **5.3.3 Formal internal communications**

785 If correspondence between Committees involves issues or decisions (that is, non-routine matters) affecting
786 other Committees, copies of such correspondence shall be sent to all affected subgroup Chairs, the
787 Committee Chairs, the Committee officers, the Managing Director(s) and ISA staff.

788

789 **5.3.4 External communications**

790 Inquiries relating to the Committee should be directed to ISA staff, and members should so inform individuals
791 who raise such questions. ISA staff shall handle routine inquiries or information requests, and shall direct
792 other inquiries as appropriate to the Chair or Managing Director.

793 **5.3.5 Requests for interpretation of standards**

794 All requests for interpretation of an ISA STANDARD shall be submitted in writing to the Secretary of the ISA
795 Standards and Practices Board, for referral to the responsible Committee (see Annex C.). Revisions to a
796 STANDARD resulting from requests for interpretations shall be processed in accordance with these *Procedures*.

797 **5.4 Governing procedures**

798 On questions of governing procedures not covered in this document, the latest versions of several documents
799 take precedence over the procedures in this document in the following order:

- 800 a) Applicable US Federal Law and Regulations
- 801 b) North Carolina State Not-for-Profit Corporation Law
- 802 c) *ISA Bylaws*
- 803 d) *ISA Society and Executive Board Manual of Organization and Procedures*
- 804 e) *ISA Board of Department Vice Presidents Manual of Organization and Procedures*

805 On questions of procedures not otherwise covered by these documents, *Robert's Rules of Order* (latest
806 edition) shall be used to expedite due process.

807 **5.5 International standards**

808 It is ISA policy to adopt, whenever possible, unchanged international standards. When an international
809 standard is usable but requires U.S. Modifications, the international standard shall be adopted with ISA
810 Modifications (in some case referred to as an adapted international standard), and the resulting ISA STANDARD
811 shall be processed back to the international standard's developer for consideration as a change to that
812 international standard. When international standards do not exist, or are inappropriate for unchanged use by
813 ISA, it is the policy of ISA to take international standards into consideration for use when developing all new
814 standards. Any such adoption, use and processing back to the international standard's developer is to be in
815 accordance with the guidelines and operations of the international standard's developer.

816 U.S. Technical Advisory Groups (TAGs) exist for most standards projects in which the United States has
817 evidenced substantial interest. These groups may be contacted for information and advice through their
818 administrators, whose names are on record at ANSI.

819 **5.6 Commercial terms and conditions**

820 As an ANSI-accredited standards developing organization, ISA adheres to the Commercial Terms and
821 Conditions Policy set forth in the most recent edition of the *ANSI Essential Requirements: Due process*
822 *requirements for American National Standards*, which may be viewed at www.ansi.org.

823

824 **5.7 Patent policy**

825 As an ANSI-accredited standards developing organization, ISA adheres to the Patent Policy set forth in the
826 most recent edition of the *ANSI Essential Requirements: Due process requirements for American National*
827 *Standards*, which may be viewed at www.ansi.org. Assurances provided pursuant to the ANSI Patent Policy
828 regarding disclosures and licensing shall remain in effect with respect to proceedings to have ISA STANDARDS
829 adopted by international standards bodies, such as the IEC, and shall be equally applicable to such
830 internationalized standards. Disclosures shall be reaffirmed with an international standards body as required
831 by that body.

832
833 **5.8 Antitrust policy**

834 As an ANSI-accredited standards developing organization, ISA adheres to the Antitrust Policy set forth in the
835 most recent edition of the *ANSI Essential Requirements: Due process requirements for American National*
836 *Standards*, which may be viewed at www.ansi.org.

837
838 **5.9 Records**

839 Records shall be prepared and maintained at ISA Headquarters to provide evidence of compliance with these
840 *Procedures*, consistent with the records requirements stipulated in the latest version of the ANSI Essential
841 Requirements. Records relating to the revision, adoption, reaffirmation, or withdrawal of an ISA STANDARD
842 shall be maintained for at least one complete standards cycle and for at least ten (10) years from the date of
843 withdrawal.

844 **5.10 Metric policy**

845 Units of the International System of Units (SI), the modernized metric system, are the preferred units of
846 measurement in ISA STANDARDS. However, US customary units may be used by a committee in developing a
847 standard in order to achieve consistency with previous standards or industry customs, if approved by the Chair
848 of the committee.

849 **6 Due process and consensus requirements**

850 **6.1 Applicability**

851 The following requirements apply to consensus development activities for the approval, revision, reaffirmation,
852 and withdrawal of ISA STANDARDS.

853 The term "CONSENSUS" means that substantial agreement has been reached by directly and materially affected
854 interest categories. This signifies the concurrence of more than a majority, but not necessarily unanimity.
855 Consensus requires that all views and objections be considered, and that an effort be made toward their
856 resolution.

857 **6.2 Due process requirements**

858 Due process means that any person (organization, company, government agency, individual, etc.) with a direct
859 and material interest has a right to participate by: a) expressing a position and its basis, b) having that position
860 considered, and c) having the right to appeal. Due process allows for equity and fairness. The following two
861 sections, *Openness* and *Committee balance*, describe the minimum acceptable due process requirements for
862 developing a consensus.

863 **6.2.1 Openness**

864 Participation shall be open to all persons who are directly and materially affected by the activity in question.
865 There shall be no undue financial barriers to participation. Participation means the ability to be a member of a
866 standards Committee or subgroup as well as the right to submit comments. ISA membership is not required to
867 be a voting or information member of a Committee.

868

869 Timely and adequate notice of any action to create, revise, reaffirm, or withdraw an ISA STANDARD, and to
870 establish a new consensus-developing group shall be provided to all known directly and materially affected
871 interests. Notice should include a clear and meaningful description of the purpose of the proposed activity and
872 shall identify a readily available source for further information.

873 **6.2.2 Committee balance**

874 The standards development process should have a balance of interests. Per section 4.2.2, participants from
875 diverse interest categories shall be sought with the objective of achieving balance on the consensus body.

876 To ensure balance in the development of ISA STANDARDS that are not identified as primarily safety related per
877 section 4.2.3, not more than one-half of the voting membership of the responsible consensus body may come
878 from any one of the six interest categories set forth in section 4.2.2.

879 To ensure balance in the development of ISA STANDARDS that are identified as primarily safety related per
880 section 4.2.3, not more than one-third of the voting membership of the responsible consensus body may come
881 from any one of the six interest categories set forth in section 4.2.2

882 The roster of the consensus body at the time of a final ballot shall be used to determine compliance with these
883 balance requirements.

884 **6.2.3 Lack of dominance**

885 The standards development process shall not be dominated by any single interest category, individual or
886 organization. Dominance means a position or exercise of dominant authority, leadership, or influence on the
887 consensus body by reason of superior leverage, strength, or representation to the exclusion of fair and
888 equitable consideration of other viewpoints.

889 Unless it is claimed in writing (including electronic communications) by a directly and materially affected
890 person that a single interest category dominated the standards development process of a consensus body, no
891 test for dominance is required.

892

893 **7 Designation and publication of standards**

894 **7.1 Designation**

895 The approval date of an ISA STANDARD as an American National Standard shall be included in the STANDARD,
896 preferably on the cover. The standard shall also include the words "American National Standard" on the title
897 page or cover. Portions of the document that are not part of the American National Standard (such as
898 forewords, prefaces, annexes, interpretations, etc.) shall be clearly identified at the beginning of each such
899 clause.

900 a) ISA STANDARDS shall be identified by a unique alphanumeric designation. An ISA STANDARD approved by
901 the American National Standards Institute as an American National STANDARD shall be designated as an
902 ANSI/ISA STANDARD.

903 b) Multiple designations should be avoided. If an ISA STANDARD has multiple designations, an attempt shall
904 be made by those concerned to arrive at a single designation.

905 **7.2 Date of publication**

906 For documents approved by ANSI, publication shall be no later than six months after approval, unless
907 circumstances require ISA staff to request an extension using the appropriate section of the BSR-11 form.

908

909 **7.3 Style of publication**

910 New ISA STANDARDS shall be prepared in accordance with the *IEC Style Guide*. Revisions and reaffirmations
911 of ISA STANDARDS should be prepared in accordance with the *IEC Style Guide* to the extent practical.

912 A copy of this *Guide* is available from ISA staff.

913 **7.4 Copyright policy**

914 ISA asserts ownership of all rights of copyright to its standards, including drafts, technical reports,
915 recommended practices, and the completed, adopted standard for the convenience and benefit of all
916 concerned. Participation is governed by the following requirements for participation as an ISA Standards
917 Committee member:

918 a) Each member will respect the intellectual property rights of others. Each member shall not knowingly
919 provide or insert in any committee materials any copyrighted works for which the member has not received
920 permission as necessary for use with the standard.

921 b) No member shall disclose any proprietary or confidential information in the course of Standards
922 Committee participation without authorization.

923 c) In consideration of the privilege of participating in the ISA Standards process, each participant irrevocably
924 transfers to ISA all right, title, and interest in and to any standard or other material developed under the
925 auspices of ISA, including copyright, that such participant might otherwise acquire by law.

926 A complete copy of the ISA Policy *Copyright of ISA Standards* is available from ISA staff.

927 **8 Maintenance of standards**

928 **8.1 Periodic review of standards**

929 Each complete ISA STANDARD (including supplements and addenda) shall be reaffirmed, revised, or withdrawn
930 as follows:

931 a) At least annually after approval of an ISA STANDARD, ISA staff shall notify the responsible Managing
932 Director and the Chair of the date when action is required to reaffirm, revise, or withdraw the STANDARD
933 within five (5) years after its approval.

934 b) With approval of the Chair, Managing Director, or the Board, ISA staff will issue an ANSI PINS form or
935 BSR-8 form to initiate the proposed reaffirmation, revision or withdrawal for ISA STANDARDS approved by
936 ANSI. If a PINS or BSR-8 has not been submitted for an ANSI/ISA STANDARD within five years after its
937 approval, ISA staff may request an extension of time to reaffirm or revise the standard, or shall withdraw
938 the standard. The request for an extension of time shall be submitted to ANSI within thirty days following
939 five years after the approval date of the ANSI/ISA STANDARD. No extension of time beyond ten years from
940 the date of approval shall be granted for action on a standard, except in the case of a national adoption
941 (that which is an identical adoption of an ISO or IEC standard) as outlined in the *ANSI Procedures for the*
942 *National Adoption of ISO and IEC Standards as American National Standards*.

943 **8.2 Withdrawal**

944 If a request for extension is denied by ANSI, the Secretary of the Standards and Practices Board shall inform
945 the Managing Director and Committee of the reasons for the denial. If the Committee fails to comply with
946 *8.1 Periodic review of standards*, the responsible Managing Director may recommend to the Board that
947 approval of the ISA STANDARD be withdrawn (subject to a majority vote of the Board.)

948

949 **9 Appeals**

950 **9.1 Introduction**

951 The provision for appeals is important for the protection of directly and materially affected interests and of ISA
952 as the standards developer, and is required as part of due process.

953 The appeal process set forth in this section applies only to Standards. Procedural appeals may not be filed for
954 Recommended Practices and Technical Reports, which are not normative documents and are not issued for
955 ANSI Public Review.

956 **9.2 Right to appeal**

957 Persons who have directly and materially affected interests and who feel they have been or will be adversely
958 affected by any improper procedural action or inaction with regard to the development of a proposed ISA
959 STANDARD, or the revision, reaffirmation, or withdrawal of an existing ISA STANDARD, have the right to appeal
960 and shall be informed in writing (which may include electronic communications) of that right. Procedural action
961 or inaction includes whether a technical issue was afforded due process.

962 The burden of proof to show adverse effect(s) shall be on the appellant. Appeals of action shall be made
963 within 30 days of notification of the action. Appeals of inaction may be made at any time. Appeals shall be
964 directed to the Department Vice President.

965 **9.3 Complaint**

966 Complaints shall be in writing and shall be submitted to the Department Vice President with a copy to ISA
967 staff. The written appeal must specifically address the following four items. Failure to address any of the four
968 items, including stating specifically the adverse effect(s) alleged, may result in a denial of the appeal on the
969 grounds that it is incomplete.

970 a) the nature of the objection(s) including the adverse effect(s) alleged

971 b) actions or inactions that are at issue

972 c) the specific remedial action(s) that would satisfy the appellant's concerns

973 d) previous efforts to resolve the objection(s) and the outcome of each shall be noted

974 **9.4 Response**

975 The following criteria shall apply to any appeals mechanism provided pursuant to the procedures:

976 Complaints shall be addressed promptly and a decision made expeditiously. Within 30 days after receipt of
977 the complaint, the Department Vice President in consultation with the relevant Committee officer(s) and any
978 Committee participant against whom any alleged improper action has been made (hereafter known as the
979 "respondent") shall respond in writing to the appellant, specifically addressing each allegation of fact in the
980 complaint to the extent of the Department Vice President's knowledge.

981 The response of the Vice President shall include a written notice to the appellant of the right to request a
982 hearing as set forth in section 9.5 if the appellant does not agree with the Vice President's written response.

983

984 **9.5 Hearing**

985 The right of the involved parties to present their cases shall not be denied. If the appellant does not accept the
986 Vice President's resolution of the written complaint, the appellant has 14 days, ending at 7:00 pm Eastern US
987 time on the fourteenth day after the Vice President issues his response, to notify the Vice President in writing
988 that the appellant is requesting a hearing. If the appellant does not inform the Vice President within the 14
989 days, the appellant is assumed to have agreed with the Vice President's resolution and the appeal is closed.

990 If the appellant requests a hearing, the Department Vice President shall schedule a hearing with an appeals
991 panel on a date agreeable to all participants, giving at least ten working days advance notice.

992 **9.6 Appeals Panel**

993 An Appeals Panel shall consist of three individuals, appointed by the Department Vice President, who have
994 not been directly involved in the matter in dispute and who will not be materially or directly affected by any
995 decision made or to be made in the dispute.

996 **9.7 Conduct**

997 The burden of demonstrating that the Committee and the Department took improper actions not in compliance
998 with these *Procedures* shall be on the appellant. Each party may cite other pertinent arguments, and
999 members of the appeals panel may address questions to individuals. *Robert's Rules of Order* (latest edition)
1000 shall apply to questions of parliamentary procedure for all appeals hearings.

1001 **9.8 Decision**

1002 The appeals panel shall render its decision within 30 days in writing to the appellant and the Department Vice
1003 President, stating findings of fact and conclusions, with reasons therefore, based on a preponderance of the
1004 evidence. Consideration may be given to the following positions, among others, in formulating the decision:

- 1005 a) Finding for the appellant, remanding the action to the Committee with a specific statement of the issues
1006 and facts that demonstrate how fair and equitable action was not taken
- 1007 b) Finding for the respondent, with a specific statement of the facts that demonstrate fair and equitable
1008 treatment of the appellant and the appellant's objections
- 1009 c) Finding that new, substantive evidence has been introduced, and remanding the entire action to the
1010 Committee for appropriate reconsideration

1011

1012 **10 ANNEX A – ISA Standards Code of Conduct (Normative)**

- 1013
- 1014 **ISA Standards Committee participants are guided by the following code of conduct:**
- 1015 a) to understand that they serve on ISA Standards Committees as individuals, and not as representatives of
1016 companies or other organizational entities;
- 1017 b) to accept responsibility in making decisions consistent with the safety, health and welfare of the public,
1018 and to disclose promptly factors that might endanger the public or the environment;
- 1019 c) to avoid real or perceived conflicts of interest whenever possible, and to disclose them to affected parties
1020 when they do exist;
- 1021 d) to be honest and realistic in stating claims or estimates based on available data;
- 1022 e) to reject bribery in all its forms;
- 1023 f) to improve the understanding of technology, its appropriate application, and potential consequences;
- 1024 g) to maintain and improve technical competence and to undertake technological tasks for others only if
1025 qualified by training or experience, or after full disclosure of pertinent limitations;
- 1026 h) to seek, accept, and offer honest criticism of technical work, to acknowledge and correct errors, and to
1027 credit properly the contributions of others;
- 1028 i) to treat fairly all persons regardless of such factors as race, religion, gender, disability, age, or national
1029 origin;
- 1030 j) to avoid injuring others, their property, reputation, or employment by false or malicious action;
- 1031 k) to assist colleagues and co-workers in their professional development and to support them in following this
1032 code of ethics.
- 1033
- 1034

1035 **11 Annex B – Procedure for Addressing Alleged Violations of the ISA Code of Ethics**
1036 **or Inappropriate Behaviors in ISA Standards Committee Activities (Normative)**

- 1037
1038
1039 1. ISA Standards activities are governed by the ISA Standards & Practices Board of Directors (S&P Board),
1040 which is chaired by a Vice President (S&P VP).
1041
1042 2. A participant in ISA Standards activities may have his or her participation privileges suspended or revoked
1043 for any of the following:
1044
1045 a. Failure to conform with provisions of the *ISA Bylaws, ISA Code of Ethics, ISA Standards & Practices*
1046 *Manual*, other similar documents, or with the specific procedures of the Committee or Committee subgroup.
- 1047 b. Unethical or unlawful, or objectionable conduct unbecoming a participant in ISA or compromising the
1048 integrity of ISA or disrupting the ISA Standards development process.
- 1049 3. A person who observes or learns of such conduct officially informs the S&P VP in writing. Such notice
1050 cannot be anonymous. The S&P VP may also self-initiate a complaint. The S&P VP reviews the information,
1051 gathers additional information as needed from the complainant and/or the subject of the complaint, and sends
1052 that information to the SCC.
- 1053 4. The S&P VP appoints a three-member Standards Conduct Committee (SCC), from members of ISA who
1054 have no vested interest in the matter.
- 1055 5. The SCC determines whether further proceedings are justified. If so, the SCC formally notifies the
1056 participant of the complaint and invites the participant to respond in writing. The SCC may seek additional
1057 information from the complainant, participant, and other sources as well. The SCC may, but is not required to,
1058 conduct a hearing at which the complainant and the participant are given an opportunity to attend. Each may
1059 submit additional documentation prior to the hearing.
- 1060 6. If the SCC determines, with a two-thirds vote of its three members, that the participant has engaged in
1061 conduct described in Section 2.a or 2.b, above, the SCC may recommend suspension or revocation of the
1062 subject's participation privileges, or some lesser disciplinary measure. The recommendation is forwarded to
1063 the S&P Board which, with a vote of two-thirds of the S&P Board members who are present and voting at a
1064 S&P Board meeting, may approve the recommendation, and, for suspension, will indicate the terms of same.
1065 The participant and complainant shall be informed of the decision of the S&P Board.
- 1066 7. The participant may appeal suspension or revocation by notifying the S&P VP within 10 days. In such case,
1067 the S&P VP schedules an appeal hearing at the next S&P Board meeting, to which the subject and the
1068 complainant shall be invited to present their case directly to the S&P Board. The S&P Board may then decide
1069 to sustain, modify, or reverse their prior decision.
- 1070 8. At any point in the process for addressing alleged violations, the SCC may negotiate a resolution with the
1071 participant that, if acceptable to the participant and the SCC, will end the proceedings on the complaint.
- 1072 9. The participant will have no legal claim against ISA or any individual participant. A revoked subject may not
1073 participate in ISA S&P activities unless granted approval by the S&P Board.
- 1074
1075

1076 **12 ANNEX C – Interpretation Policy (Normative)**

1077

1078 **C. 1 Introduction**

1079 All inquiries received by the S&P Department concerning formal interpretations of an ISA Standard shall be in
1080 writing to the Secretary of the Standards & Practices Board, and shall be answered in writing by the
1081 appropriate Committee Chairperson in accordance with the procedure given in C.2. Only an interpretation of a
1082 Standard processed in accordance with the procedure of C.2 shall be considered to be a formal interpretation
1083 of a Standard.

1084 Inquiries that are answered without following the procedure given in C.2 by a Committee Chairperson,
1085 Committee member, ISA staff member, or anyone else, whether in oral or written format, are not formal
1086 interpretations. Rather, such responses are the personal opinions of the responders, and the responders
1087 should so inform the persons making the inquiries.

1088 **C.2 Procedure**

1089 Requests for formal interpretations shall be processed as follows:

1090 The S&P Board Secretary shall assign an inquiry number consisting of the standard number followed by an “I”
1091 number and a sequential number, e.g. ISA-75.01.01-I-3.

1092 The S&P Board Secretary shall forward the written inquiry to the Committee Chairperson (and if applicable,
1093 the subgroup Chairperson) with copies to the Managing Director and the Department Vice President.

1094 The Committee Chairperson may, if needed, write a letter, which shall be part of the inquiry, to obtain
1095 additional clarification.

1096 The Committee Chairperson shall forward the original inquiry and any additional clarification to the Committee
1097 members, together with a proposed response for their comments. The Committee members shall have 30
1098 days to respond.

1099 Following the 30-day committee response period, the Chairperson shall draft a written reply to the inquiry
1100 based on the comments received from members and shall send the proposed interpretation to the committee
1101 for their approval. Committee responses shall be returned to the Chairperson within 30 days. If a majority of
1102 the committee members approve, the proposed interpretation will become the official answer to the inquiry.
1103 The official answer should be posted on the ISA web site and in other suitable media outlets.

1104 **C.3 Records**

1105 ISA staff shall maintain a written record of any inquiries addressed and the record shall be forwarded to the
1106 S&P Board for information.

1107 **C.4 Future Work**

1108 Interpretations shall be considered by the Committee as proposed material for an addendum or future revision
1109 to the standard.