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Technical Contact Checklist for Standard Development

This document is a checklist of items for technical contacts to guide their work while developing an ASTM standard.

- ☐ Get approval to register a work item either at a sub-committee meeting or from the sub-chair

- ☐ Take out a work item through ASTM website (tracking number)

- ☐ Work with staff manager to invite/notify all stakeholders and issue a press release

- ☐ Consider a collaboration area to post drafts for discussion/comment (invite task group members and interested stakeholders; non-members can be added)

- ☐ Request task group time on upcoming meeting schedule asap (contact sub-chair or staff manager)

- ☐ Draft the document or revisions with the task group

- ☐ Get approval to submit the draft to ballot (either at a meeting or by the Sub-Chair or Main Chair)

- ☐ Submit the draft item to ballot (either through the online system or to AA)

- ☐ Monitor votes while the ballot is open (**see next page for negative resolution. If draft passes sub ballot with no negatives it will automatically move on to the next Main ballot)

- ☐ Monitor votes while the draft is on Main ballot (**see next page for negative resolution.) If draft passes main ballot with no negatives it will automatically move on to editorial prior to publication. It will be approximately 4-6 weeks until you hear from the staff editor.

- ☐ Work with editor to review final draft before publication

Nice work, you've successfully navigated the ASTM process!

**If you receive negatives on a ballot, below are the steps you should follow to resolve:

FIRST:

☐ Contact the negative voter (discuss the negative/ technical issues and determine path forward)
☐ Provide an opportunity for discussion of the negative
☐ If you have many negatives and are thinking of multiple dispositions, contact your staff manager

THEN, below are your options for negative vote resolutions:

If the negative voter decides to Withdraw or Withdraw with Editorial Changes

☐ Request that the negative voter send an email to you and the staff manager confirming their withdrawal.
☐ Alert your task group members, as well as the sub-chairman.
☐ Appropriately resolve the vote as Withdrawn or W/D with Editorial Changes on the ASTM website (be sure to have the editorial changes available to upload when resolving on the ASTM website)

Note: If all negatives are withdrawn the standard will receive an approval date and move to the editor for review and publication.

If the negative vote is to be ruled Persuasive (this option requires you to re-ballot)

☐ Alert your task group members, as well as the sub-chairman.
☐ Appropriately resolve the vote as Persuasive on the ASTM website
☐ Revise draft to re-ballot
☐ Coordinate re-ballot with staff manager

If the negative vote is to be ruled Not Persuasive

☐ If the negative voter and technical contact cannot agree, schedule a meeting to review the negative vote with the task group and/or subcommittee. Try to schedule the meeting at a time that the negative voter can attend in person or virtually so he or she can defend their negative statement.

☐ If the negative will be handled at the next subcommittee meeting, notify the subcommittee chairman and staff manager.

☐ Prepare rationale that addresses all points of the negative comment.

☐ Present rationale and obtain a not persuasive (or not related) motion and seconded at the subcommittee meeting.

☐ Take an official vote of the subcommittee voting members (2/3 affirmative vote required).

- Present the same rationale to the Main Committee to uphold the subcommittee vote for not persuasive (motion and seconded).

- Take an official vote of the Main committee voting members (2/3 affirmative vote required).

- Enter rationale and voting results into the negative disposition page on the ASTM website.

Note: After all negatives are resolved, the draft standard will move forward either to the next ballot level (if the item was on sub ballot) or to editorial for review/publication (if the item was on Main ballot).

If the negative vote is to be ruled Not Related (normally not used for brand-new standards)

- Consult your staff manager on the pros and cons of resolving negative votes as not related
- If you believe the negative statement blatantly does not address any part of the standard that was actually on ballot, then a Not Related resolution is appropriate.
- Follow the same steps for Not Persuasive resolution (see above)

- If a letter ballot is desired for handling the negative vote as not persuasive or not related:
  - Consult your staff manager on the pros and cons of resolving negative votes via letter ballot versus at a meeting.
  - If a letter ballot is still desirable, obtain authorization from the appropriate subcommittee chairman if you plan on first conducting a subcommittee ballot only to resolve the negative. If the letter ballot will not be issued until after the next subcommittee meeting, you could conduct a subcommittee vote to authorize the ballot.
  - If a concurrent ballot is desirable, obtain authorization from the subcommittee chairman and main committee chairman. If the letter ballot will not be issued until after the next subcommittee and main committee meeting, you could conduct a subcommittee and main committee vote to authorize the ballot.
  - Inform the negative voter that a letter ballot for handling the negative vote has been authorized.

Notes on editorial review and publication:

After all negatives are resolved (or if no negatives were received), the draft standard will move forward either to the next ballot level (if the item was on sub ballot) or to the committee editor for review/publication (if the item was on Main ballot). Approximately 3-6 weeks after the standard has received an approval date (either the 1st of the 15th of the month, whatever comes first), the committee editor will contact you to review an edited and formatted file. Review carefully; this file is your opportunity to check the document one last time for edits or formatting issues, once you respond to the editor with your approval the document will officially be published in the ASTM system (the new document may take a few days to appear on the website).