IEEE Standards Development—

Balloting the Standard

Lisa Perry
Program Manager
Technical Program Development

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Topics

Standards Development Lifecycle

– Overview of the Six Stages

– Stage 4: Balloting the Standard

• Invitation and MEC

• Sponsor Ballot

• Comment Resolution

• Recirculation

Standards Development Lifecycle

Stage 6
- Approved revision needed within 10 years to remain "active"
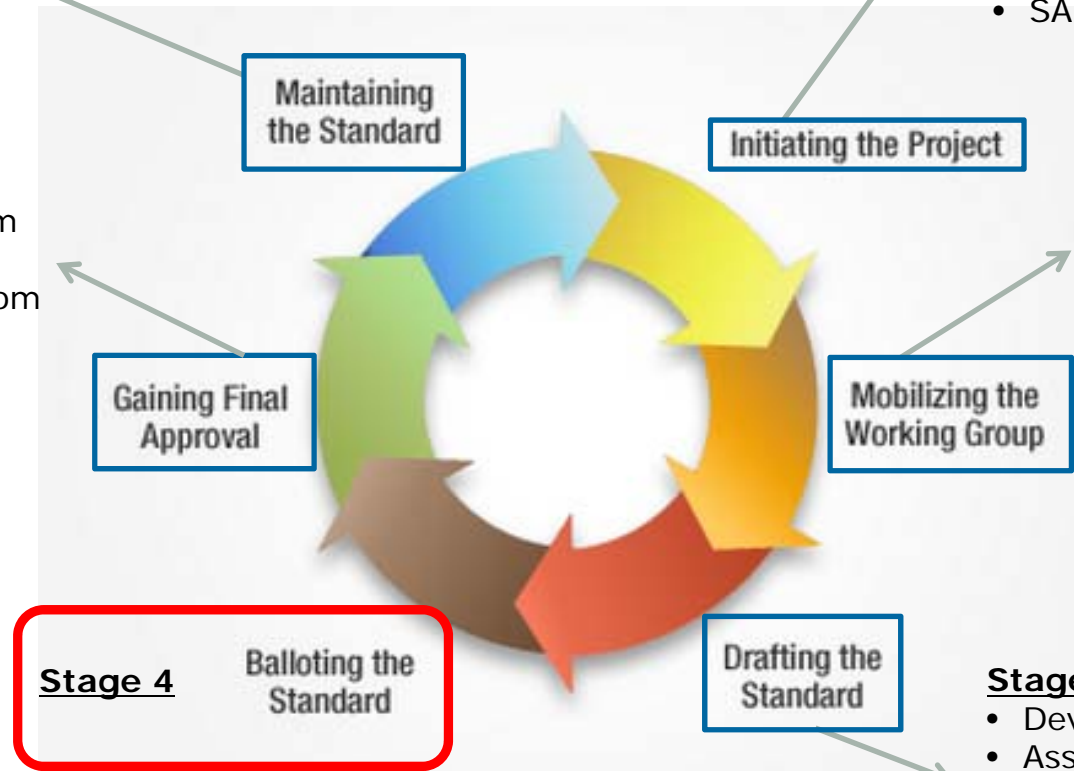- Amendments
- Corrigendum

Stage 5
- Submit to RevCom
- RevCom review
- Respond to RevCom
- RevCom meeting
- SASB approval
- Publication

Stage 4

Stage 1
- Draft the PAR
- Submit the PAR
- NesCom review
- SASB approval

Stage 2
- Membership rules in WG P&Ps
- Broad representation of interested parties
- Meeting notices
- Meeting minutes
- WG member list

Stage 3
- Develop outline
- Assign writing
- Technical editor (option)
- IEEE Standards Style Manual

Maintaining the Standard

Initiating the Project

Gaining Final Approval

Mobilizing the Working Group

Balloting the Standard

Drafting the Standard

Standards Development Lifecycle— Balloting the Standard

URL for the Standards Development Lifecycle: http://standards.ieee.org/develop/index.html

The WG Votes to Approve the Draft Standard for Sponsor Ballot

- Consensus in the WG - draft is ready for sponsor ballot
- Next steps
  - Initiate the Invitation
  - Submit the draft for MEC (Mandatory Editorial Coordination)

Mandatory Editorial Coordination

1. Mandatory Editorial Coordination (MEC) ensures that basic elements of the document, such as draft labeling, copyright statements and releases are all handled properly in the draft.

2. When the WG is ready to send the draft to ballot, the draft is submitted to the IEEE-SA project editors for the MEC.
   - MEC submission form:
     http://standards.ieee.org/develop/mecform.html
   - What the editors check for:
     http://standards.ieee.org/develop/draft_cklst.pdf

3. **The MEC is usually started when the ballot invitation opens. Both typically complete within 30 days.**

4. The MEC report contains two sections:
   a. Items/issues that shall be resolved before balloting begins.
   b. Items/issues that shall be resolved before the final recirculation. These issues have to be resolved and viewed by balloters.

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Sponsor Balloting

1. **Ballot Invitation -** Opened for at least 15 days (typically 30 days) in myProject.
   a. Invitation sent to your choice of IEEE Societies, Sponsors, WGs, and external email lists.
   b. Must be IEEE-SA Individual Member to join Individual ballots , or pay per-ballot fee (links for options are included in the ballot notification).
   c. Balloters shall classify their relationship relative to the scope of the draft standard (e.g. producer, user, academic, government).
   d. The ballot group shall be balanced. No group (classification) shall constitute more than one-third of the balloting group membership. Sponsors may define additional classifications.
   e. Invitation may be extended or reopened to increase/balance the ballot group.
   f. Balloting shall begin within 6 months of when the ballot invitation closes.

2. **Ballot Opens -** WG Chair, Sponsor Chair, or a designee submits draft for balloting in myProject. Ballot opens when Staff Liaison approves the request.
   a. Balloters notified that ballot opens
   b. Ballot opened for at least 30 days

Sponsor Balloting (continued)

3. **Balloters Vote** - Approve, Do Not Approve, or Abstain.

4. **Comment Resolution –** WG responds to ballot comments in myProject.

   a. WG shall respond to all comments.

   b. Response should show that the WG seriously considered the comment.

   c. The WG shall make a reasonable attempt to resolve all *Do Not Approve* votes that are accompanied by comments.

   d. Editorial comments addressing grammar, punctuation, and style, whether attached to an *Approve* or a *Do Not Approve* vote, may be referred to the publications editor for consideration during preparation for publication

   e. SASB Operations Manual on comment resolution:
   http://standards.ieee.org/develop/policies/opman/sect5.html#5.4.3.3

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Sponsor Balloting (continued)

Ballot Resolution – How It's Done and Who Does It?

■ The Working Group is responsible for responding to all comments

■ WG officers

■ Entire WG

■ Ballot resolution committee (BRC) (selected by Chair representing various interests)

How to Address a Negative Balloter?

- Respond in myProject (responses are seen by balloters during the recirculation)

- Respond in writing (WG response sent by the Chair to the balloter via email)

  • Balloter has option to change negative vote to affirmative in writing

  • The written change in vote must be submitted to RevCom and recirculation is not necessary

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Sponsor Balloting (continued)

5. **Recirculation Ballot –** Required if substantive changes were made to the draft, or if there are any unresolved *Do Not Approve (with Comments)* votes (not editorial comments).

   a. Until 75% approval is achieved, comments can be based on any part of the document.

   b. Once 75% approval is achieved, comments shall be based only on the changed portions of the draft, portions of the draft affected by the changes, or portions of the draft that are the subject of unresolved comments associated with *Do Not Approve* votes.

   c. Recirculation ballots are opened for at least 10 days.

   d. Balloters can change their votes during a recirculation ballot (on changed text or text associated with a negative vote)

6. **Balloting Completes** – The IEEE consensus requirement is met when the following is achieved:

   a. At least 75% of the ballot group voted

   b. Fewer than 30% of the ballot group voted *Abstain*

   c. The number of *Approve* votes is 75% or more of the total *Approve* and *Do Not Approve (with Comments)* votes.
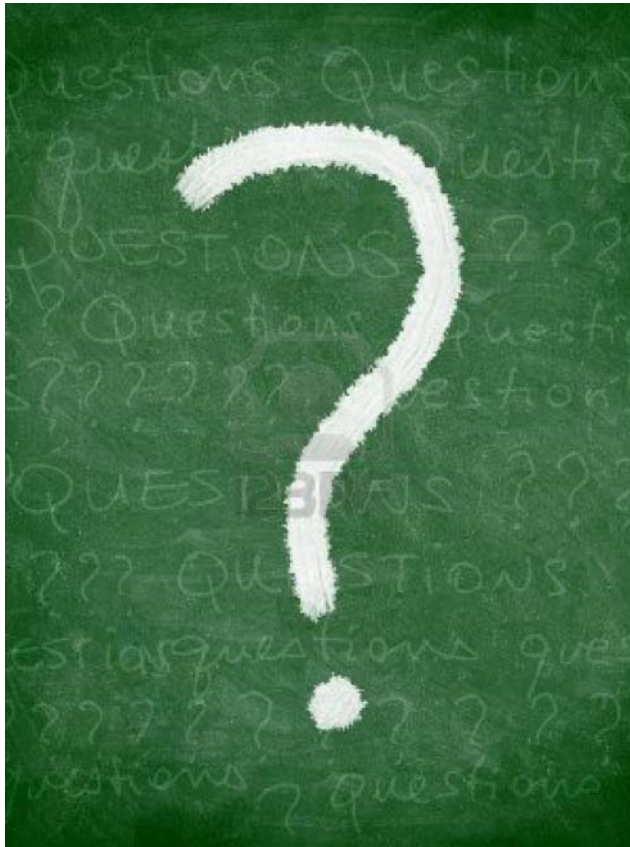
Questions?

Contact Information Page

Lisa Perry

Program Manager, Technical Program Development

IEEE
445 Hoes Lane
Piscataway, NJ 08854
T: 732-562-3942

l.perry@ieee.org