WELCOME TECHNICAL COMMITTEE

IAPMO CODE DEVELOPMENT PROCESS FOR THE UNIFORM SOLAR, HYDRONICS & GEOTHERMAL CODE (USHGC) & UNIFORM SWIMMING POOL, SPA & HOT TUB CODE (USPSHTC)

2021-2024
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COMMITTEE SCOPE AND RESPONSIBILITY

» USHGC - Primary responsibility for documents that contain the minimum requirements for the protection of the public health, safety and welfare that apply to the erection, installation, alteration, repair, relocation, replacement, addition to, use or maintenance of solar energy, hydronics and geothermal systems.

» USPSHTC - Primary responsibility for documents that contain the minimum requirements for the protection of the public health, safety and welfare that apply to the erection, installation, alteration, repair, relocation, replacement, addition to, use or maintenance of swimming pool, spa, and hot tub systems.

» TCC - Technical Correlating Committee (TCC) responsibilities include:
  • Resolves conflicts between codes
  • Provides correlation among the recommendations of the TC’s
  • Corrects errors and omissions
  • Has the authority to choose between alternatives presented by the TC’s
COMMITTEE MEMBERSHIP

3-5.13.1 Appointment of Members and Their Tenure. The Chairperson and Vice Chairperson shall be appointed by the Executive Committee from the individual members of the USHGC/USPSHTC Technical Committee. Each will serve until a successor is selected and ready to serve.

3.5.10 Termination of Membership. The Executive Committee shall be authorized to terminate the membership of an individual on the USHGC/USPSHTC Technical Committee for cause, including inactivity. A USHGC/USPSHTC Technical Committee member shall be considered inactive:

(a) For failure to return two successive ballots, or

(b) For failure to attend at least one USHGC/USPSHTC Technical Committee, Subcommittee, or Task Group meeting in a three-year period.
THE CODE DEVELOPMENT PROCESS (Step 1)

1. **STEP 1**
   - **PUBLIC AND COMMITTEE PROPOSAL STAGE**

2. **REPORT ON PROPOSALS POSTED**

3. **PROPOSAL CLOSING DATE**

4. **BALLOT PROPOSALS**

5. **FIRST TECHNICAL COMMITTEE MEETING**
THE CODE DEVELOPMENT PROCESS (Step 1), cont.

Step 1: Public and Committee Proposal Stage

• Revision cycle begins with call for proposals asking for any interested party to submit public proposals.

• After the proposal closing date, the technical committee holds their first technical meeting.

• Committee uses the proposals in order to develop the first revisions to the standard that results in a complete integrated draft known as the Report on Proposals.

• The Report on Proposals has initial agreement by the committee based on a simple majority vote during the meeting to establish a consensus.

• The final position of the committee is established by letter ballot.
THE CODE DEVELOPMENT PROCESS (Step 1), cont.

Step 1: Public and Committee Proposal Stage (cont.)

- Committee is balloted on all proposals based on first revisions developed at TC meeting.

- Committee approved revisions are indicated through their actions and approval is based on two-thirds vote.

- Any proposal that failed to achieve the necessary two-thirds vote is noted in the Report on Proposals and reconsidered by the technical committee as an automatic public comment.

- Report on proposals consists of public input, committee input, correlating committee input, comments on committee actions, voting results from ballots, task group reports and preprint of the revised standard.
CODE DEVELOPMENT TIMELINE
CALL FOR PROPOSALS

- **September 13-14, 2021**
  - TC Meeting (Via Teleconference)
  - September 13 - USPSHTC, September 14 - USHGC

- **March 4, 2022**
  - Deadline for Submission of Proposals

- **June 20-21, 2022**
  - Technical Committee Meetings
  - June 20 - USPSHTC, June 21 - USHGC

- **July 22, 2022**
  - Receipt of Initial Ballots; Circulation of Comments to Committee

- **August 5, 2022**
  - Technical Correlating Committee meeting (Via Teleconference)

- **November 1, 2021**
  - Call for Proposals

- **May 16, 2022**
  - Distribute Proposals to Committees (ROP Monograph)

- **July 8, 2022**
  - Initial Ballot to Technical Committee

- **July 29, 2022**
  - Final Closing Date for Ballots; Including Receipt of Vote Changes based on Circulation of Comments

- **September 9, 2022**
  - Distribution of Report on Proposals
THE CODE DEVELOPMENT PROCESS (Step 2)

STEP 2
PUBLIC AND COMMITTEE COMMENT STAGE

REPORT ON COMMENTS POSTED

COMMENT CLOSING DATE

BALLOT COMMENTS

SECOND TECHNICAL COMMITTEE MEETING
THE CODE DEVELOPMENT PROCESS (Step 2), cont.

Step 2: Comment Stage

• Public comment period begins after the Report on Proposals is published.

• Call for public comments asking for any interested party to submit public comments.

• After the public comment closing date, the Technical Committee holds second technical meeting.

• Technical Committee considers and acts on all comments directly related to the Report on Proposals.

• Committee provides action and response to each public comment and uses such comments in order to develop the Report on Comments.

• The Report on Comments has the initial agreement by the committee based on simple majority vote during the meeting in order to establish consensus.

• The final position of the committee is established by letter ballot.
CODE DEVELOPMENT TIMELINE
CALL FOR COMMENTS

January 13, 2023
Deadline for Submission of Comments

May 15-16, 2023
Technical Committee Meetings
USPSHTC - May 15, USHGC - May 16

June 19, 2023
Receipt of Initial Ballots, Circulation of Comments to Committee

July 10, 2023
Technical Correlating Committee meeting (Via Teleconference)

October 7, 2022
Call for Comments

April 3, 2023
Distribute Comments to Technical Committees (ROC) Monograph

June 5, 2023
Initial Ballots to Technical Committees

June 26, 2023
Final Closing Date for Ballots; Including Receipt of Vote Changes Based on Circulation of Comments

September 1, 2023
Distribution of Report on Comments
THE CODE DEVELOPMENT PROCESS (Step 3)

STEP 3
EXECUTIVE COMMITTEE APPEAL HEARINGS

ISSUANCE OF STANDARD

SENT TO EXECUTIVE COMMITTEE FOR ISSUANCE
IAPMO TECHNICAL COMMITTEE MEETING

WHAT MATERIALS DO I NEED?

• USPSHTC/USHGC Code Book
• Technical Committee Meeting Agenda
• Monograph of Proposals/Comments
• Current Committee Roster
• Regulations Governing Consensus Development of the USPSHTC/USHGC
• IAPMO Technical Committee Newsletter
GENERAL PROCEDURES

• Members please verify/update your contact information.

• Use of tape recorders or other means capable of reproducing verbatim transcripts of this or any IAPMO meeting is not permitted.

• Members in any category who have been retained to represent the interests of another interest category with respect to a specific issue addressed by the TC or TCC shall declare those interests to the committee and refrain from voting throughout the process.

• Guests are required to sign in and identify their affiliations.

• Participation is limited to TC members or those individuals who have previously requested time to address the committee. Other participation is granted at the discretion of the Chair.
Robert’s Rules of Order apply to Parliamentary Procedures

• Beginning of Technical Meeting: Chair presents Proposals or Comments and asks for motion.

• TC member addresses Chair and receives recognition from the Chair.

• TC member states name, affiliation, exact motion and reason statement.

• Chair looks for a second of the motion, then restates the motion and reason statement.

• Chair calls for discussion, once discussion starts, restate your name and whether you are for or against the motion.

• Chair takes the vote.

• Chair announces the result of the vote.
A main motion must be moved, seconded, and stated by the chair before it can be discussed.

If you want to move, second, or speak to a motion, raise your hand and address the chair.

If you approve the motion as is, vote for it.

If you disapprove the motion, vote against it.

If you approve the idea of the motion but want to change it, amend or modify it.

If you want time to think the motion over, postpone to a certain time (Table the item).

If you think that the committee should give further consideration to a matter already voted upon, move that it be reconsidered.

If you think that further discussion is unnecessary, move the previous question or call the question.

If a motion has several parts, and you wish to vote differently on these parts, move to divide the motion.
VOTING AT MEETING

Straw vote at Technical Committee Meeting to achieve consensus:

Technical Committee Action on Proposals:

Accept the proposal as submitted - The committee accepts the proposal exactly as written. Only editorial changes such as paragraph and section numbering and correction to spelling, capitalization, and hyphenation may be made.

Accept the proposal as amended by the TC - Accept the proposal with some modification. The committee action must indicate specifically what action was taken to revise the proposal.

Reject the proposal - The committee rejects the proposal. If the principle or intent of the proposal is acceptable in whole or in part, the proposal should not be rejected, it should be revised by the committee and accepted as amended. A complete reason for rejection of the proposal, technical in nature, must be supplied in the committee statement.
Technical Committee Action on Comments:

Accept the comment as submitted- The committee accepts the comment exactly as written. Only editorial changes such as paragraph and section numbering and correction to spelling, capitalization, and hyphenation may be made.

Accept the comment as amended by the TC- Accept the comment with some modification. The committee action must indicate specifically what action was taken to revise the proposal.

Reject the comment- The committee rejects the comment. If the principle or intent of the comment is acceptable in whole or in part, the comment should not be rejected, it should be revised by the committee and accepted as amended. A complete reason for rejection of the comment, technical in nature, must be supplied in the committee statement.

Holding the Comment- A comment is held until the next revision cycle if it would introduce a concept that has not had public review by being included in the ROP; would require significant change to the text that the TC would need to restudy; or would propose something that could not be properly handled within the time frame for processing the report.
VOTING (After TC Meeting)

• Voting during TC meeting is used to establish a sense of agreement (simple majority).

• Initial ballot sent to appropriate Technical Committee for review.

• Circulation of negatives and comments sent to appropriate Technical Committee for review.

• Ballots that fail letter ballot in the Report on Proposals become an automatic public comment (to solicit public input).

• Secured by letter ballot (2/3 affirmative vote).

• Results of formal ballot determine the official position of the committee.
ELECTRONIC BALLOTING

- Click link on the ballot email or go to www.kavi.iapmo.org
- Sign in with Username and Password
ELECTRONIC BALLOTING AND KAVI

- Click on “Groups” under “My Groups”
- Select the applicable TC Group
ELECTRONIC BALLOTTING AND KAVI (cont.)

- Click on Ballots
- Click the ballot name that you are voting on
ELECTRONIC BALLOTING AND KAVI (cont.)

- Make selection: Affirmative, Negative or Abstain
- Must include comment on Negative or Abstain vote
- Click vote to submit selection

![Image of voting interface with steps highlighted]

- **Step 4 - Click to open and review proposed change**
- **Step 5 - If applicable, click to open voting details and view other comments submitted by other Technical Committee members.**
- **Step 6 - Make ballot selection**
- **Step 7 - Click “vote” to submit ballot selection**
GUIDELINES FOR REFERENCING MANDATORY STANDARDS

• Provides guidance to TC for referencing mandatory standards.

• Scope or application must be clearly described.

• Shall be written in mandatory language.

• States specific criteria that minimize the judgment required by the users.

• Standard shall not have the effect of requiring proprietary materials.

• Standard shall not prescribe a proprietary agency for quality control or testing.
REFERENCED STANDARDS AND PUBLICATIONS

- **Standard** – A document, the main text of which contains only mandatory provisions using the word “shall” to indicate requirements and which is in a form generally suitable for mandatory reference by another standard or code or for adoption into law. Nonmandatory provisions shall be located in an appendix, footnote, or fine-print note and are not to be considered a part of the requirements of a standard.

- **Mandatory Referenced Standards in IAPMO Codes and Standards**
  - **15.1 General.** Mandatory standards referenced in IAPMO Codes and Standards shall be written using mandatory language and shall be identifiable by title, date or edition, and name of the developing organization. An original copy of the reference standard shall be on file at IAPMO Headquarters if not readily available from other sources.
  - **15.2 Development.** Mandatory Standards referenced in IAPMO Codes and Standards shall be developed via an open process having a published development procedure. The development procedure shall include a means for obtaining divergent views, if any. The development procedure shall include a means of achieving consensus for the resolution of divergent views and objections.
  - **15.3 References.** Mandatory standards referenced in IAPMO Codes and Standards not complying with Section 15.2 are permitted. However, in such instances the TC shall determine that the mandatory standard is appropriate for reference. The TC shall verify the standard is written in mandatory language, is identifiable by title, date or edition, and developing organization, and that it is readily available. Any mandatory standard proposed for reference on the basis of this paragraph shall be specifically identified as not complying with Section 15.2 in a ROP or ROC.
• **15.4 Nonmandatory Reference Standards in IAPMO Codes and Standards.** Reference standards that do not comply with Section 15.1 shall only be referenced as nonmandatory standards and shall only be included as advisory material in an IAPMO Code or Standard.

• **15.5 Nonmandatory Referenced Publications in IAPMO Guide Documents and Recommended Practices.** Publications referenced in IAPMO Guide Documents and Documents establishing recommended practices shall be subject to Section 15.6.

• **15.6 Reference to Other IAPMO Documents or Documents Published by Other Organizations.** When a reference is made in a Technical Committee Report to another IAPMO Document or other publications prepared by any organization, such a reference shall contain the title, date or edition, name of the developing organization and preferably the specific parts of the Document to which reference is made. TCs shall include such references only after review of such Documents or publications, satisfying themselves that the references are adequate and appropriate. An original copy of the reference Document shall be on file at IAPMO Headquarters, if not readily available from other sources.
EXTRACT GUIDELINES

- This guideline is intended to apply to extraction among IAPMO documents, and documents between IAPMO and other ANSI-accredited standards developing organizations that are working with IAPMO to harmonize and/or coordinate their respective documents.

- Editing of the extracted text is confined only to making the style consistent with that of the document containing the extract.

- The extracted text is kept current with that of the source document.

- **If the technical committee does not wish to include the updated extract, the existing extract shall be deleted from the source document.**
MANUAL OF STYLE

• The purpose of this manual is to promote uniformity of form and style in IAPMO codes.

• Aids the user to find what is required and to understand the metrics of developing a standard for codes.

• Deviations from the manual of style may mean wasted time for authors, reviewers, editors, and eventually the user of the code.
IAPMO CODES WEBSITE (cont.)

- Hover over Codes & Standards
- Click on Code Development
Select Code “USHGC” or “USPSHTC”
IAPMO CODES WEBSITE (cont.)

• Click on Document Information
• Current and next edition
• Document Scope
• Archived revision information
• Manual of Style
IAPMO CODES WEBSITE (cont.)

- Committee Members
- Scope and Responsibility
- General Committee Member Information
• Archived Revision Information
• Technical Correlating Committee
THIS CONCLUDES OUR OVERVIEW OF IAPMO’S CODES DEVELOPMENT PROCESS

ANY QUESTIONS?

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