Strategic Planning & New Activity Development
MOU Capacity Building Program for JSMO

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www.astm.org
Operating Globally

- One of the world’s largest Standards Developing Organizations, with global reach and influence
- ASTM’s experience offers a robust, time-tested development process delivering globally accepted and respected standards
  - Established 1898
  - 30,000+ members in 155+ nations
  - 145+ Technical Committees meeting market needs of 90+ industry sectors
- Trusted for market relevance and technical quality
  - The choice for many global industries
International Standards

WTO TBT Committee Decision

- The World Trade Organization (WTO) Technical Barriers to Trade (TBT) Committee Decision on Principles for the Development of International Standards, Guides and Recommendations provides guidance:
  - in the form of six principles; does not designate SDOs
  - helps regulators determine which international standards may be relevant for the purposes of the TBT Agreement

<table>
<thead>
<tr>
<th>WTO/TBT Principles</th>
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<tbody>
<tr>
<td>Transparency</td>
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<tr>
<td>Openness</td>
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<tr>
<td>Impartiality and Consensus</td>
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<tr>
<td>Effectiveness and relevance</td>
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<tr>
<td>Coherence</td>
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<td>Consideration of developing nations</td>
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The ASTM MoU Program

Memorandum of Understanding

ASTM International

- Full collection of ASTM Standards
  (adoption, as the basis of a national standard, consultation, normative reference, reference in regulation)
- Membership at no cost to participant
- Training (on-site, virtually; sponsored and shared cost)

MoU Partner

- Access to ASTM standards in its Information Center
- Annual Report on use of ASTM standards
- Utilization of ASTM standards where relevant and appropriate

119 MoU partners worldwide

8400+ citations of ASTM standards in 75 non-US nations
Strategic Planning

➢ Development of an Action Plan or Roadmap
  ➢ Short Term and Long Term Objectives
➢ Provides direction and focus
➢ Reinforces the assets and attributes of the committee making it stronger
➢ Maximizes efficiency, usage and acceptance
Strategic Planning

➢ Current Status: Strengths, Weaknesses, Needs

➢ Define future directions, objectives and priorities
  ➢ Short, mid and long-term strategies

➢ Develop goals to meet objectives
  ➢ Accountability, milestones and benchmarks

➢ Implementation
  ➢ Incremental progress

➢ Evaluation
  ➢ Review and revise plan
Considerations

➢ Needs of a specific industry / committee
  ➢ Safety, quality, efficiency

➢ Stage of committee or activity
  ➢ New, mature, innovating

➢ Desired end goal: utilization of standards
What are your Needs?

➢ Appropriate Membership

➢ Awareness & Acceptance of Standards

➢ Standards Roadmapping

➢ Accelerated Standards Development

➢ Programs and Services
Increased & Appropriate Membership

➢ Review Membership: Identify who is there and who is missing

➢ Leverage Executive Subcommittee for Contacts
  ➢ Outreach Strategy

➢ Develop Materials to Supplement Personal Outreach
  ➢ Committee Promotional Materials
  ➢ Invitation Letter
Increased Awareness & Acceptance of Standards

➢ Develop Communications Strategy
  ➢ Committee promotional materials
  ➢ Press releases and social media posts
  ➢ Committee presentation template for consistent messaging

➢ Ask Trade Associations to amplify ASTM press releases to their membership
Standard Roadmapping

➢ Where are you now and where do you need to be?
   ➢ List of existing standards
   ➢ Where are the gaps?

➢ How do we stay ahead?
   ➢ What will we need in 5 years? 10 years?
   ➢ Determine priorities

➢ Leverage your technical committee(s)
   ➢ Committee survey
   ➢ Industry survey
## Standard Roadmapping Considerations

<table>
<thead>
<tr>
<th>What are the biggest concerns facing regulators?</th>
<th>What are the biggest concerns for consumers/users?</th>
</tr>
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<tbody>
<tr>
<td>- Safety?</td>
<td>- Integration, Accessibility?</td>
</tr>
<tr>
<td>- Reliability?</td>
<td>- Labeling, Training, Certifications?</td>
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<tr>
<th>What are the biggest financial challenges of manufacturers?</th>
<th>What are the biggest challenges of laboratories?</th>
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<tbody>
<tr>
<td>- Product conformance to state programs? Components?</td>
<td>- Homogenous samples?</td>
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<tr>
<td>- Increase costs for production?</td>
<td>- Variability of test methods?</td>
</tr>
<tr>
<td>- Audits and Sampling?</td>
<td>- Apparatus / device variability?</td>
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<td>- Reporting requirements?</td>
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Impact Success

- Mirror Roadmap sections to subcommittees
- Consider the two approaches for short and long term priorities
- Easy to modify and easy to report

- Include minimum necessary information
  - Type of standard
  - Short title
  - Priority level
  - Rationale
  - Affected subcommittee
  - Timelines/progress
Accelerated Standards Development

- **Support Services**
  - Form and system manual
  - Online templates
  - Upfront editing / full-time Editor
  - Graphics department (figures, 3D images)
  - Access to similar technical standards
  - Interlaboratory study program development

- **Collaboration Services**
  - WebEx
  - Collaboration Areas
  - Meetings

- **Ballot Early, Ballot Often**
  - Use ballot for feedback during development

- **Partnerships**
  - Save resources of industry
  - Early engagement with R&D

- **Staff**
  - Staff manager
  - Administrative assistant
  - Business Development
  - Global offices

**Workshops**
- Technical Workshops
- Shared research
- Standards Discussions
Programs & Services: Implementing Standards

➢ Industry Programs
  ➢ Product Testing and Certification
  ➢ Personnel Training
  ➢ eLearning Modules
  ➢ Proficiency Testing Programs (PTP)

➢ Consider Program Development Earlier
  ➢ Roadmap is developed and implemented *Strategically*
  ➢ Standards content is approached properly
  ➢ Program components built in parallel
  ➢ Early engagement with R&D, Innovation Institutes, CoE’s

➢ Remember the Drivers and Objective
  ➢ Standards are your solution
  ➢ Baseline for Industry Programs
Achieving Success

➢ Simple and clear
➢ Use target dates
➢ Must have accountability
➢ Regularly review progress
Measuring Progress

➢ Return to implementation plan

➢ Hold people accountable to assignments

➢ Execute corrective action and adjust schedules

➢ Reward accomplishments
Incorporating Planning into Committee Structure

➢ Force planning as a priority
➢ Function of Executive Subcommittee of Ad Hoc Group
➢ Regular communication with committee members
➢ Need to know the pulse of the industry – solicit external input if needed
➢ Use staff resources
Conclusion

➢ Start with an Executive Subcommittee meeting
➢ There are different ways to accomplish a goal
➢ Don’t underestimate actual requirements
➢ Flexibility, Flexibility, Flexibility
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