



MEETING REPORT  
INTERSOCIETY LIAISON SUBCOMMITTEE /  
INTERNATIONAL STANDARDS ADVISORY SUBCOMMITTEE

2013 ASHRAE Annual Conference – Denver, CO  
Friday, June 21, 2013

**Members Present:** Jay Kohler (ILS/ISAS chair), Karim Amrane (ILS/ISAS), Hoy Bohanon (ILS/ISAS), Debra Kennoy (ILS/ISAS), Essam Khalil (ISAS), Michael Newman (ISAS)

**Members Absent:** James Walters (ISAS), Cecily Grzywacz (ILS/ISAS)

**Guests:** Ken Cooper (StdC), Julia Keen, Wayne Reedy, Bill Walter (StdC V-Chair)

**Staff:** Douglas Tucker, AMOS-I, Secretary

**I. Chairman’s Remarks and Introductions..... Kohler**

The chair opened the meeting at 1:00 pm and welcomed the members to Denver. The focus of the meeting will be on approving the “International Adaptation of ASHRAE Standards and Guidelines.”

**II. Adoption of Agenda with Additions and Changes..... Kohler**

The committee adopted the agenda as circulated by the Secretary.

**III. Secretary’s Report .....Tucker**

**A. Review of ILS and ISAS Membership**

ILS Membership, 2013-2014

Debra Kennoy [15], Chair  
Karim Amrane [14]  
James Aswegan [17]  
Doug Tucker (Staff)

ISAS Membership, 2013-2014

Debra Kennoy [15], Chair  
Karim Amrane [14]  
James Aswegan [17]  
Dr. Essam E. Khalil [15]  
Mike Newman [15]  
James Walters (AHRI) [14]  
Doug Tucker (Staff)

**B. Approval of minutes of January 2013 meeting**

A motion was made by Newman and seconded by Khalil to approve the minutes of the January 2013 meeting. The motion passed 5-0-1-2 (Amrane abstained – he did not attend the Dallas meeting).

**C. Open Action Item from Technology Council/ExCom**

**Develop a process for ASHRAE to follow in responding to requests for adapting ASHRAE standards for use in other countries/regions.**

An action item was assigned to Technology Council by ExCom to develop a process for ASHRAE to follow in responding to requests for adapting ASHRAE standards for use in other countries/regions.

The chair provided a summary of the action taken since the action item was assigned.

The document titled “International Adaptation of Standards and Guidelines”, which provides a scope and set of principles for this process, was first presented to Standards Committee for approval after the Dallas meeting. The first draft failed the StdC ballot (12-13-0-1, CV). ILS/ISAS held two conference calls subsequent to this ballot and revised the document to address comments received from StdC. The Chair reviewed some of negative comments received from StdC members from the ballot.

Newman recommended that a specific routing process be defined since the current guidelines mix together various scenarios. A flowchart would be useful.

Reedy suggested that the final document look as much as possible like an ASHRAE standard and that we don’t specifically state on the cover that it is “not an ASHRAE standard” (though it would be fine to state that it’s not an ANSI standard). With regard to adaptation, he stated that in the process of preparing the standards and corresponding user manual for Saudi Arabia, anything not relevant to their application was removed from the base ASHRAE standards and anything not specific enough was elaborated with information taken from ASHRAE sources. For Saudi Arabia a public review process was initiated and the national standards organization SASO was also involved.

Reedy also recommended that ASHRAE provide a trail or traceability to the source of information and that an ASHRAE staff person be available to devote time for technical support.

A motion was made by Amrane and seconded by Newman to recommend to StdC that the amended document “International Adaptation of Standards and Guidelines” (attached as an annex to this report) be presented to Technology Council as completion of this action item.

**MOTION PASSED.** 6-0-0-2, CV

**FISCAL IMPACT:** None.

**IV. Review of Open Action Items..... Kohler**

- **Action Item SLC #1 – The Secretary** is to develop a matrix showing all related ASHRAE standards, SPCs, and TCs in relation to existing and draft international standards. The secretary is to then draft a letter to the TC and SPC chairs outlining standards and CEN/ISO TCs of potential interest and explaining CEN/ISO and liaison procedures.

**Status - Ongoing.**

- **Action Item SLC #2 – The Secretary** is to provide ILS/ISAS with international sales data for ASHRAE standards, a list of ASHRAE standards in wide use internationally (“de facto” international standards, e.g. Standard 34), and a list of ASHRAE standards that have been adopted internationally (ISO, regionally, individually). The committee also asked the Secretary to obtain a list of standards that have been translated into other languages.

**Status – Ongoing.** The Secretary completed the final portion of this action item (translated standards) at the Winter 2012 meeting.

- **Action Item LV #1 – The Secretary** and Jim Walters are to prepare a questionnaire for the local chapters to address implementation plan item 3, bullet 2.

**Status – Ongoing.**

- **Action Item MON #2 – The Secretary** accepted an action item to circulate a letter to the Region-at-Large, Associate Society Alliance, and international chapters. The letter will serve to introduce the standards matrix and a “questionnaire” for local use and adaptation of ASHRAE standards.

**Status – Ongoing.**

- **Action Item MON #3 – The Secretary** accepted an action item to incorporate the consideration of international standards and participation of international experts in PC work plans, the form for proposing a new ASHRAE standard, and the PC reference manual.

**Status – Ongoing.** ASHRAE SPCs now have the ability to add International Organizational Liaisons to their rosters. The Secretary will address the various ASHRAE forms prior to the next meeting.

**V. ASHRAE Representatives on Committees of Other Organizations:**

**A. Update on Intersociety Representatives activities.....Tucker**

<u>Organization / Committee</u>	<u>Representative</u>	<u>Cognizant TC/SPC/SSPC</u>
ANSI Z9, Health and Safety Standards for Ventilation (AIHA)	Thomas C. Smith	SSPC 62.1, TC 4.3
ASTM D22.05, Sampling and Analysis of Atmosphere: Indoor Air	Andy Persily	SSPC 62.1, TC 4.3
Green Building Initiative	Bill Coad	SSPC 189.1, TC 2.8
IAPMO Uniform Mechanical Code	Steven Taylor	SSPC 62.1

IAPMO Uniform Solar Energy & Hydronics Code	Open	TC 6.7
IKECA Standards Development Committee	Mike Watz	SPC 154
NEMA SC 7, Adjustable Speed Drives	Terry Davies	TC 1.11
NFPA, Air Conditioning (AIC-AAA)	James Buckley	TC 7.3
US TAG ISO/TC 242, Energy Management	Dennis Landsberg	TC 7.6

A motion was made by Kohler and seconded Amrane to approve the 2013-2104 list of intersociety representatives for confirmation by the MOS. The motion passed 3-0-0, CV

**B. Tracking ANSI PINS and Public Reviews of interest to ASHRAE .....Tucker**

The AMOS-I reviews ANSI Standards Action (published weekly) to identify public review and project initiation notices for standards which may conflict with published or proposed ASHRAE standards. The following actions have been taken since the 2013 Winter Conference. Unless otherwise noted, no conflicts or overlap with existing or proposed ASHRAE standards were identified.

- i. **IEEE** announced the initiation of two new standards, BSR/IEEE 2030.5-201x, Standard for Smart Energy Profile 2.0 Application Protocol, and BSR/IEEE 2030.102.1-201x, Standard for Interoperability of Internet Protocol Security (IPsec) Utilized within Utility Control Systems, in the May 31, 2013 edition of ANSI Standards Action. The notices were sent to SPC 201P, Facility Smart Grid Information Model.
- ii. **CEA**, the Consumer Electronics Association, announced the initiation of two new standards, BSR/CEA 2045-201x, Modular Communications Interface for Energy Management, and BSR/CEA 2047-201x, CE Energy Use Standards, in the May 24, 2013 edition of ANSI Standards Action. The notices were sent to SPC 201P, Facility Smart Grid Information Model.
- iii. **BPI**, the Building Performance Institute, announced the public review of BSR/BPI 1106-201x, Standard Practice for Residential Energy Efficient Building Operation, in the May 17, 2013 edition of ANSI Standards Action. The notice was sent to SSPC 189.1, Standard for the Design of High-Performance, Green Buildings Except Low-Rise Residential Buildings, SSPC 62.2, Ventilation and Acceptable Indoor Air Quality in Low-Rise Residential Buildings, SSPC 90.2, Energy Efficient Design of Low-Rise Residential Buildings, GPC 14, Measurement of Energy and Demand Savings, TC 7.3, Operation and Maintenance Management, and TC 7.6, Building Energy Performance.
- iv. **RESNET**, the Residential Energy Services Network, Inc., announced the public review of BSR/RESNET Standard 301-201x, Standard for the Calculation and Labeling of the Energy Performance of Low-Rise Residential Buildings using the HERS Index, in the April 12, 2013 edition of ANSI Standards Action. The notice was sent to SSPC 90.2, Energy Efficient Design of Low-Rise Residential Buildings, SPC 100, Energy Efficiency in

Existing Buildings, SPC 105, Standard Methods of Determining, Expressing and Comparing Building Energy Performance and Greenhouse Gas Emissions, GPC 14, Measurement of Energy and Demand Savings, SSPC 62.2, Ventilation and Acceptable Indoor Air Quality in Low-Rise Residential Buildings, and TC 7.6, Building Energy Performance.

- v. **ICC**, the International Code Council, announced the initiation of a new standard, BSR/ICC 1000-201x, Standard for Commissioning, in the March 22, 2013 edition of ANSI Standards Action. The notice was sent to SPC 202P, Commissioning Process for Buildings and Systems. **The MOS sent a letter to ICC on April 15, 2013 outlining the potential conflict between the proposed BSR/ICC 1000-201X standard and the proposed BSR/ASHRAE Standard 202P, Commissioning Process for Building and Systems.**
- vi. **IAPMO**, the International Association of Plumbing and Mechanical Officials, announced the initiation of the revision of IAPMO USEC 1-201x, Uniform Solar Energy and Hydronics Code, in the March 22, 2013 edition of ANSI Standards Action. The notice was sent to TC 6.7, Solar Energy Utilization.
- vii. **IIAR**, the International Institute of Ammonia Refrigeration, announced the public review of BSR/IIAR 5-201x, Start-Up and Commissioning of Closed-Circuit Ammonia Mechanical Refrigeration Systems, in the March 15, 2013 edition of ANSI Standards Action. The notice was sent to TC 7.3, Operation and Maintenance Management, and TC 10.1, Custom Engineered Refrigeration Systems.
- viii. **IIAR**, the International Institute of Ammonia Refrigeration, announced the public review of BSR/IIAR 7-201x, Developing Operating Procedures for Closed-Circuit Ammonia Mechanical Refrigeration Systems, in the March 15, 2013 edition of ANSI Standards Action. The notice was sent to TC 7.3, Operation and Maintenance Management, and TC 10.1, Custom Engineered Refrigeration Systems.

**VI. Canvass Method Standards.....Tucker**

ASHRAE participates in the review of standards in the fields of HVAC&R developed by other American National Standards developers. ASHRAE participation is either solicited by the standards developer directly or prompted by staff review of ANSI Standards Action.

- A. SMACNA:** ASHRAE staff submitted proposed standard BSR/SMACNA 014-201x, *HVAC Systems – Commissioning Manual* to SPC 202 for review and comment. ASHRAE returned a vote of ‘abstention’ to SMACNA due to a lack of participation and consensus (only two ballots were returned).
- B. SMACNA:** ASHRAE will participate in the canvass review of BSR/SMACNA 008-2008 (R201X), *IAQ Guidelines for Occupied Buildings Under Construction*.

**VII. International Standards:**

- A. Implementation plan for international standards policy .....Tucker**

ISAS discussed the international standards implementation plan in detail and assigned actions items to execute specific parts of the plan such as 1) increasing international participation in the ASHRAE standards development process, 2), communicating with ASHRAE’s international membership and associate societies regarding demand for ASHRAE standards 3) promotion of international standards activities in ASHRAE.

The chair advised the committee that this implementation plan continues to be central to what we are doing as a committee; the promotion of ASHRAE standards and development of standards with international application.

**B. Information on recent TC and WG meetings .....Tucker**

**i. US TAG to ISO/TC 59/SC 13 - Buildings and civil engineering works - Organization of information about construction works**

ASHRAE has submitted the accreditation form for administration of the US TAG to ISO/TC 59/SC 13 to ANSI for approval. The notice appeared in the June 21, 2013, issue of ANSI Standards Action. The roster of this TAG will initially consist of the voting members of ASHRAE MTG.BIM, Multidisciplinary Task Group - Building Information Modeling.

**ii. ISO/TC 86 – Refrigeration and Air-Conditioning**

- a. ISO 16358-1:2013, *Air-cooled air conditioners and air-to-air heat pumps -- Testing and calculating methods for seasonal performance factors – Part 1: Cooling seasonal performance factor*, ISO 16358-2:2013, *Part 2: Heating seasonal performance factor*, and ISO 16358-3:2013, *Part 3: Annual performance factor*, have been published.
- b. ISO/TC 86/SC 8 met in April to address comments and prepare the second FDIS ballot for ISO/FDIS 817, *Refrigerants – Designation and safety classification*, which failed the first approval ballot.
- c. ISO/TC 86/SC 1/WG 1 and ISO/TC 86/SC 1 meet in Dallas in conjunction with the ASHRAE winter conference to address comments and prepare the second FDIS ballots for ISO/FDIS 5149 (in 4 parts), *Refrigerating systems and heat pumps – Safety and environmental requirements*, which failed the first approval ballot. The primary substantive comments submitted with the disapproval votes concerned the treatment of class 2L refrigerants and the eventual need to harmonize with IEC, CEN and ASHRAE standards.
- d. ISO/DIS 16494, *Heat recovery ventilators and energy recovery ventilators – Method of test for performance*, passed the enquiry ballot and will proceed to the approval stage.

**iii. ISO/TC 142 – Cleaning equipment for air and other gases**

- a. ISO 10121-2:2013, *Test method for assessing the performance of gas-phase air cleaning media and devices for general ventilation — Part 2: Gas-phase air cleaning devices (GPACD)*, has been published.

- b. ISO 29461-1:2013, Air intake filter systems for rotary machinery -- Test methods -- Part 1: Static filter elements, has been published.
- c. ISO 29462:2013, Field testing of general ventilation filtration devices and systems for in situ removal efficiency by particle size and resistance to airflow, has been published.
- d. ISO/CD 12249-1, Particulate air filters for general ventilation -- Part 1: Method of calculation for the life cycle cost for air cleaning devices, passed the committee review and will advance to the enquiry stage.
- e. ISO/DIS 15957, Loading dusts for testing air cleaning equipment, is currently under enquiry ballot.
- f. ISO/CD 16890-1, Air filters for general ventilation -- Part 1: Technical specifications, requirements and efficiency classification system based upon Particulate Matter (PM), passed the committee review and will advance to the enquiry stage.
- g. ASHRAE will host the 2013 meetings of ISO/TC 142 in Atlanta on 16-19 September.

**iv. ISO/TC 180 – Solar Energy**

- a. ISO/DIS 9806, Solar energy – Solar thermal collectors – Test methods, passed the enquiry ballot and is currently under the approval ballot.
- b. ISO/DIS 22975-3, Solar Energy – Collector components and materials – Part 3: Absorber surface durability, passed the enquiry ballot.

**v. ISO/TC 205 – Building Environment Design**

- a. ISO 12655:2013, Energy performance of buildings — Presentation of measured energy use of buildings, has been published by the TC 163-TC 205 joint working group.
- b. ISO/FDIS 13612, Heating and cooling systems in buildings -- Method for calculation of the system performance and system design for heat pump systems -- Part 1: Design and dimensioning and Part 2: Energy calculations passed the enquiry ballot and have been submitted for the approval ballot.
- c. ISO/FDIS 13675, Heating and cooling systems in buildings - Method and design for calculation of the system energy performance - Combustion systems (boilers), passed the enquiry ballot and has been submitted for the approval ballot.
- d. ISO/PRF 16343, Energy performance of buildings – Methods for expressing energy performance and for energy certification of buildings, has been submitted by the TC 163-TC 205 joint working group for publication.
- e. ISO/PRF 16346, Energy performance of buildings – Assessment of overall energy performance, has been submitted by the TC 163-TC 205 joint working group for publication.
- f. ISO/FDIS 16484-5, Building automation and control systems – Part 5: Data communication protocol, has been submitted for the approval ballot. This is an identical adoption of ANSI/ASHRAE Standard 135-2012.

- g. ISO/FDIS 16484-6, Building automation and control systems (BACS) – Part 6: Data communication conformance testing, has been submitted for the approval ballot. This is an identical adoption of ANSI/ASHRAE Standard 135.1-2011.
- h. ISO/WD 17800, Facility Smart Grid Information Model, has been accepted as a working draft. This is an adoption of BSR/ASHRAE Standard 201sP, Facility Smart Grid Information Model.
- i. ISO/TC 205 and ISO/TC 163, Thermal performance and energy use in the built environment, will meet concurrently in Stockholm, Sweden in September 2013.

**C. ISO/TC 59/SC 13: P-membership and administration of the US TAG .....Tucker**

The Secretary informed ILS/ISAS that the public review notice of ASHRAE administration of the US TAG to ISO/TC 59/SC 13 appeared in the June 21, 2013 issue of ANSI Standards Action. The comment period closes on July 22, 2013.

**D. ISO/TC 163: P-membership and administration of the US TAG .....Tucker**

ISAS discussed ASHRAE acceptance of responsibility for the establishment and administration of the US TAG to ISO/TC 163 and the corresponding ANSI Participating Membership on ISO/TC 163.

The US (ANSI) is currently a participating member of ISO/TC 163 with ASTM as administrator of the US TAG. ASTM announced in the 5/3/13 edition of ANSI Standards Action that it is relinquishing the role of administrator of the US TAG to ISO/TC 163.

For the past four years, ISO/TC 205, for which ASHRAE holds the secretariat and is administrator of the US TAG, has closely coordinated their work in the area of building energy efficiency with ISO/TC 163. The ISO/TC 163-ISO/TC 205 Joint Working Group on *Energy Performance Using a Holistic Approach* has been very active, producing four standards related to the energy performance of buildings. The US has been underrepresented on this joint working group from the TC 163 side, and administration of the US TAG to ISO/TC 163 by ASHRAE would bolster US and ASHRAE participation in ISO/TC 163.

The following ASHRAE technical committees, and standard project committees for which they are cognizant, work directly in areas under the scope of ISO/TC 163:

- TC 1.3, Heat Transfer and Fluid Flow
- TC 1.8, Mechanical Systems Insulation
- TC 1.12, Moisture Management in Buildings
- TC 4.1, Load Calculation Data and Procedures
- TC 4.2, Climatic Information
- TC 4.3, Ventilation Requirements and Infiltration
- TC 4.4, Building Materials and Building Envelope Performance
- TC 4.5, Fenestration
- TC 4.7, Energy Calculations
- TC 7.6, Building Energy Performance



- MTG.BPM, Building Performance Metrics

ASHRAE staff will coordinate the transfer of this TAG with ANSI, including transfer of the existing operating procedures and TAG roster. There are no fees for the transfer of this TAG from ASTM to ANSI if the operating procedures and roster are unchanged. After ASHRAE assumes the administration of this TAG, a ‘call for members’ announcement will be made in ANSI Standards Action and ASHRAE Standards Action.

Fiscal impact: Approximately \$1,500.00/year for the additional P-membership and ANSI program fees, commencing with the 2013-14 Society year. The resulting increase in the international portion of the dues payable to ANSI will be covered by an increase in the budget and the disbandment of ISO/TC 86/SC 2 and possibly SC 3, for which ASHRAE currently pays the US memberships.

A motion was made by Newman and seconded by Amrane for ASHRAE to initiate the process for acceptance of responsibility for the administration of the US TAG to ISO/TC 163 and the corresponding ANSI Participating Membership on ISO/TC 163 and its subcommittees. The motion passed 6-0-0-2.

**E. Review of TC, SC and TAG leadership positions .....Tucker**

ILS/ISAS reviewed document VIID and discussed current positions and the process for succession and appointment.

<b>ISO/TC 86</b>	ASHRAE	Drake Erbe (term ends 12/31/2015)
ISO/TC 86/SC 1	ASHRAE	Pascal Folempin, France (term ends 12/31/2013)
ISO/TC 86/SC 2	ASHRAE	To be disbanded
ISO/TC 86/SC 3	AHRI	Propose to disband
ISO/TC 86/SC 4	SAC (China)	Derrick J. Newson (term ended 12/31/2012)
ISO/TC 86/SC 6	AHRI	Daniel Ellis (term ends 12/31/2014)
ISO/TC 86/SC 7	AHRI	Derek Lea (term ends 12/31/2015)
ISO/TC 86/SC 8	ASHRAE	Sonny Sundaresan (term ends 12/31/2014)
<b>ISO/TC 142</b>	UNI (Italy)	Paolo Tronville (term ends 12/31/2013)
<b>ISO/TC 180</b>	SA (Australia)	Ken Guthrie (term ends 12/31/2013)
ISO/TC 180/SC 1	SA (Australia)	Wolfgang Finsterle (term ends 12/31/2018)
ISO/TC 180/SC 4	ASHRAE	Jim Huggins (term ends 12/31/2013)

<b>ISO/TC 205</b>	ASHRAE Stephen Turner (term ends 12/31/2013)
<b>ISO/TC 86 TAG</b>	ASHRAE Danny Halel
<b>ISO/TC 142 TAG</b>	ASHRAE Don Thornburg
<b>ISO/TC 180 TAG</b>	ASHRAE Jim Huggins
<b>ISO/TC 205 TAG</b>	ASHRAE Mike Newman

**VIII. Regional Review of Standards Activities:**

**A. Europe ..... Tucker**

No report.

**B. North America ..... Walters**

No report.

**C. Middle East / Asia-Pacific ..... Khalil**

Dr. Khalil reported on the adaptation of ASHRAE standards in Saudi Arabia. The Arab Air Conditioning Code, for which Dr. Khalil is chairman, will be published soon.

**IX. Other Business..... Kohler**

No other business was presented

**X. Next Meeting..... Kohler**

The next meeting of ILS/ISAS will be held on Friday, January 17, 2014, in New York, NY, from 1:00 pm to 4:00 pm.

**XI. Adjournment ..... Kohler**

The meeting was adjourned at 3:30 p.m.

## **Annex A**

Action item from BOD EXCOM:

*Develop a routing process for immediate response to requests and opportunities as they may arise, to adapt or adopt our standards (from international organizations) outside our normal channels and traditional processes<sup>i</sup>.*

Executive Summary:

There are three possible paths.

1. If possible, ASHRAE Standards should be written that would allow them to more easily be adopted by international organizations (the requesting body) without modification.
2. If path 1 is not followed, and if the requesting body requires that the finished product be explicitly identified as an “ASHRAE Standard\*\*” then the processes enumerated in ASHRAE rules covering development of standards must be followed. The consensus body must include a balanced group of individuals from the originating area of the world.
3. Alternatively, if the requesting body only requires that ASHRAE and/or its members be involved in the adaptation of an existing Standard(s) (e.g., they do not require that the resultant document be an “ASHRAE Standard\*\*”) then the principles below shall be followed in establishing a business arrangement with the requesting body.

\*\* The use of “Standards” also includes “Guidelines”

Details:

Path 1, Write ASHRAE Standards so they can be adopted internationally:

Most current ASHRAE Standards are “North America” centric due to the processes used for development and the available participation of qualified persons from outside North America. Limits to international participation include the cost of participation as well as the perceived applicability of developing standards in the person’s home country. While changing this perception and the focus of the Standard will be challenging, ASHRAE must embark on a long term project to change this.

Path 2, Write a new ASHRAE “International” Standard:

The rules are clearly stated and need no further explanation. One such approach is a derived standard (e.g. ASHRAE 90.6) that is tailored for the country in question. However, if ASHRAE is to become involved in truly “International” standards then the processes enumerated in our existing documents must be reviewed for applicability to requirements for such operations. This is not a simple matter and if directed, the Standards Committee can undertake this task. It is anticipated that such a review could take up to a year.

Path 3, Adapting ASHRAE Standards:

Overview:

1. Direct adoption of ASHRAE Standards or Guidelines, with no changes other than for editorial modification, is covered by path 1.
2. Published ASHRAE Standards are being “adapted” for use outside of North America and such adaptation is needed to address regional needs.
3. Adaptation of such documents is performed with the official involvement of ASHRAE and/or its designated members.
4. The translation of ASHRAE Standards into a foreign language is handled through ASHRAE Publications.
5. Adaptation of ASHRAE Standards or Guidelines by other Standards Developing Organizations (SDO’s) or model code development bodies is not included in this path as the process for adapting or referencing ASHRAE documents by such entities is currently covered by ASHRAE procedures that are overseen by the ASHRAE Code Interaction Subcommittee of the Standards Committee.
6. The cover of the resulting document must be different from ASHRAE Standards and “NOT” state that it is an ASHRAE or ANSI Standard but was adapted from ASHRAE documents.

The actual involvement of ASHRAE and its designated members must be formally established with participation, business, and any relevant ‘branding and marketing’ arrangements clearly stated before work is started.

Principles:

Requests for adapted standards may originate from ASHRAE regions or non-ASHRAE entities, including governmental entities, needing a version of an existing ASHRAE Standard, or combination of Standards, suitable for their regional use. This approach cannot be used for development of or revision to standards or guidelines for adoption and use in North America.

1. Requests shall identify personnel who will be closely involved with the document development. A clear scope for the adapted document shall be developed by the entity making the request.
2. ASHRAE Standards Staff shall work with appropriate Standards Committee members and others to assess the completeness and validity of the request and recommend the best way to proceed. Initial details of the process are provided below, however further details associated with this process, including the verification of completeness and validity must be developed by the Standards Committee and other appropriate Society bodies.
3. Once the request is deemed complete and valid by ASHRAE, ASHRAE shall initiate a formal business arrangement with the requesting body. This arrangement shall include cost and revenue sharing as well as copyright and other normal business decisions.

Initial processing of a request for “adaptation”:

1. If the process required is Path 2, then the requesting entity must be so informed and a formal request for an ASHRAE International Standard submitted.

2. Determine if a single ASHRAE Standard or a mix of ASHRAE Standards is recommended (e.g., 90.2 Kuwait incorporated information from 90.2, 90.1 and 62.1/62.2), and what disclaimers may be needed.
3. Normally, requests are based on immediate needs and a prompt consideration of the project leading to prompt completion of the requested work is needed.
4. ASHRAE will, as part of the formal agreement, identify competent personnel, including travel expenses to be incurred, to complete such work. The business agreement shall identify remuneration (if any) of such personnel and the path for such actions.
  - a. The parent PC(s) may be solicited for such personnel.
  - b. In identifying such personnel, consideration shall be given towards a balance of interests, such that all relevant interest groups are given the opportunity for participation.
5. Significant ASHRAE staff support is anticipated. A high-level ASHRAE staff member must be involved in the initial contact to assure that ASHRAE is properly prepared to respond to the request and that responding to a request does not conflict with any federal, state, or local restrictions that cover how ASHRAE operates as a business.
6. The formal agreement should include provisions for a public review by parties who may be impacted by the adapted document.
7. Provisions to change and maintain documents in accordance with the latest version of the parent ASHRAE document should be part of the formal agreement.
8. Training of the requesting entity as well as end users on the resultant document should also be part of the formal agreement.

The principles for Adaptation of ASHRAE Standards shall be incorporated into the ASHRAE Standards committee MOP.

<sup>i</sup> Letter from Costas Balaras to Ken Cooper, October 2, 2012.