IFLA Standards Procedures Manual

Compiled by the Working Group on Developing an IFLA Standards Manual for the IFLA Committee on Standards

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Approved by the IFLA Committee on Standards

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1. Introduction

1.1 Scope and purpose

The *IFLA Standards Procedures Manual* aims to give guidance to IFLA units on the production or revision of an IFLA standard.

Over the last fifty years, IFLA has produced a wide range of standards in all fields of library and information services. Standards activities are an integral part of IFLA's strategic direction. One of IFLA's responsibilities is to inspire and enhance professional practice, with a specific goal of developing and maintaining standards that foster best professional practice.

IFLA standards are internationally reviewed, published and maintained documents. They are user-oriented, freely available, and regularly updated to reflect current needs and practices. Publication is dependent on official endorsement by the Professional Council on behalf of IFLA.

Each IFLA standard reflects current consensus on principles, models, rules, guidelines, or best practice for a particular activity or service. IFLA standards in their diversity of styles and subject matter provide optimum benefit for the international library community. Standards are established by IFLA units who work in collaboration and by consensus as defined in section 3.9.

The *IFLA Standards Procedures Manual* provides guidance for the development of standards and guidelines by IFLA units. It seeks to establish: how to present the need for specific standards and guidelines; maximise consensus about the content and applicability; ensure high technical and editorial quality; promote consistency; and achieve endorsement by IFLA and the wider library and information community.

1.2 What this manual is not about

IFLA publishes many other types of documents that are endorsed by the IFLA Professional Council, the IFLA Governing Board or one of the IFLA committees or other units. These documents may be found at https://www.ifla.org/resources/. Documents that are not defined as IFLA Standards include the following:

- Professional reports: Includes case studies, reports, and articles on emerging trends or substantial project reports
- Policies: Procedures or rules endorsed by the Governing Board of IFLA that apply to the procedures and process of IFLA business
- Declarations, statements and manifestos
- Bibliographies
- IFLA annual reports or action plans

2. Typology of IFLA standards

All IFLA standards are user-oriented and freely available.

All IFLA standards are approved by a Review Team consisting of the Advisory Committee on Standards, the Chair of the unit's Division, and the Chair of Professional Council. IFLA standards are then endorsed by the Professional Council on behalf of IFLA.

IFLA standards fall into three categories:
- declarative standards such as principles, conceptual models and dictionaries;
- prescriptive standards such as rules for resource description or data encoding schemes;
- implemental standards such as guidelines, best practices.

For each category, the list of examples is non-exhaustive, and may be extended as more standards are developed in a variety of domains[1].

2.1 Declarative standards

Declarative standards are normative documents whose purpose is **general.** They normally share these characteristics:
- International in scope;
- Reached by consensus;
- Maintained and updated by an identified structure (e.g. Review Groups).

Declarative standards include but are not limited to the following types of documents.

2.1.1 Principles

Principles are general guiding rules adopted as the basis for professional understanding of a domain. They express fundamental truths that ought to be followed when considering action in a given domain — for instance when developing other standards in this domain.

Principles:
- Provide a basis for international standardisation of a domain;
- Allow for a consistent approach of a domain worldwide;
- Are the source from which ensue all other standards.

Examples of principles:
- Statement of International Cataloguing Principles

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[1] The following typology is applicable for all types of IFLA standards. For historical reasons, the metadata standards are over-represented in examples.

2.1.2 Conceptual models

Conceptual models are developed from a logical high-level analysis of the relevant domain. They guide the development of detailed data models and content standards. They may also provide the groundwork for the integration and interchange of data from different domains. Although conceptual models are not prescriptive by nature, they may become so when considering implementation in a specific system.

A conceptual model:
- Represents in logical terms the structures and concepts present in its domain of interest;
- Conveys the fundamental principles and basic functionality in its domain;
- Documents and conveys a shared understanding of the domain.

Examples of IFLA conceptual models:
- IFLA LRM (Library Reference Model)
- PRESSoo

2.1.3 Dictionaries

Dictionaries are resources that contain a selection of words relevant to a particular domain, along with information about the meaning of these words. Some dictionaries may also provide examples and context, such as related terms, scope notes, etc.

Dictionaries:
- Ensure the semantic consistency of a particular domain;
- Provide a basis for the translation of standards;

Example of IFLA dictionaries:
- *MulDiCat*, the Multilingual Dictionary of Cataloguing

2.2 Prescriptive standards

Prescriptive standards are normative documents whose purpose is practical, that is, to regulate daily practice. In addition to being user-oriented and freely available, they generally share these characteristics:
- Provide consistent practise;
- Suitable for practical work.

For metadata standards, prescriptive standards include but are not limited to the following types of documents.

2.2.1 Rules for resource description

Rules for resource description are developed with the aim to specify the requirements for the description and identification of resources held in library collections, although not restricted to those only. The stipulations are prescriptive to the extent that their implementation in cataloguing rules ensures compatible descriptive cataloguing worldwide and international exchange of bibliographic records.

Rules for resource description:
- Determine the data elements to be recorded or transcribed, with minimum requirements.
- Enhance the portability of bibliographic data in the Semantic web environment.
- Enable interoperability of metadata created according to the bibliographic description standard with other content standards.

Example of IFLA rules for resource description:
- ISBD (International Standard Bibliographic Description)

2.2.2 Data encoding schemes

Data encoding schemes specify the format in which bibliographic metadata is recorded and stored in a database so that it can be handled by computers. These are used for:
- Storing and exchanging bibliographic data.
- Facilitating the exchange of data in machine-readable form between bibliographic agencies and institutions.

Example of IFLA data encoding schemes:
- UNIMARC (Universal **MA**chine-**R**eadable **C**ataloguing) standards

2.3 Implemental standards

Implemental standards are descriptive documents whose purpose is **illustrative**. They represent "state-of the art" library processes and applications, and offer guidance on how to implement these. In addition to being user-oriented and freely available, they generally share these characteristics:
- Provide recommendations for actual practices and workflows.

Implemental standards include but are not limited to the following types of documents.

2.3.1 Guidelines

IFLA Guidelines, one of the most commonly produced IFLA standards, are detailed plans or explanations designed to assist, as well as to set boundaries for, a particular course of action.

IFLA Guidelines:
- Specify requirements.
- Make provisions.
- Give recommendations.
- Provide basic instructions based on examples about an action, or a behaviour.

Examples of IFLA Guidelines

- IFLA Guidelines for Library Services to Prisoners
- Competency Guidelines for Rare Books and Special Collections Professionals
- IFLA Guidelines for Professional LIS Education Programmes

2.3.2 Best Practices

IFLA Best Practices are a method or programme that has proven to be successful and that can be used or adapted by others to achieve similar results.

IFLA Best Practices:
- Suggest the best course of action;
- Provide information on technique, method or process;
- Provide case studies;
- Can be used for benchmarking.

Example of IFLA Best Practices
- Common Practices for National Bibliographies in the Digital Age

3. Development of IFLA standards

Activities, projects, programmes or discussions within an IFLA unit may lead the group to propose the development of appropriate standards or other documentation.

This section describes the steps an IFLA unit needs to take in developing a proposal for a new or revised standard before it is reviewed outside the IFLA unit and subsequently submitted for endorsement. There are two steps in the approval process: 1) approval of the proposal to work on a IFLA standard; 2) approval of the new or revised IFLA standard (see sections 4 and 5) .

Proposals for a new standard may originate from any IFLA unit. The most common path for review and approval is through the Standing Committees, followed by review and approval by a Review Team consisting of the Advisory Committee on Standards, the Chair of the unit's Division, and the Chair of Professional Council.

Standards originating from committees outside the professional structure, such as Regional Division Committees, or other Advisory Committees, should follow the same procedures. Where the procedures refer to the role of the "Standing Committee", a Regional Division Committee or an Advisory Committee will play a similar role in the steps before submitting to the Review Team for approval. For a Regional Division Committee, there is an extra step when submitting a proposal to develop a IFLA standard: the proposal first goes to the Chair of the Regional Council before being evaluated by the Review Team. This extra step is not required when submitting the standard for approval.

The Review Groups, reporting directly to the Advisory Committee on Standards, will act in the same role as the Standing Committee during the preparation and development of the standard. To ensure widespread consensus and support for the standard, they will consult the relevant Standing Committee(s) in the same domain as the standard throughout the development process.

For units that are not part of a Division, namely Review Groups and the other Advisory Committees, the role of the Division Chair in the Review Team will be performed by the Chair of the Advisory Committee on Standards. In these cases, the Chair of the Advisory Committee on Standards will not additionally participate in the review carried out by members of the Advisory Committee on Standards.

When the Review Team has completed their evaluation and approved the standard, the endorsement is carried out by the Professional Council on behalf of IFLA.

3.1. Proposals for a new standard

Proposals for a new standard are received and discussed by a Standing Committee. Proposals can come from members of the Standing Committee, from working groups appointed by the Standing Committee, as well as from external parties (IFLA

members, other associations, standards organisations). In deciding to propose a new standard, the following questions should be asked:
- Is there a need for an international standard in this area?
- Is IFLA the best organisation to elaborate and publish this standard?
- How would this standard improve or complement other standards?
- Does the Standing Committee support a proposal to investigate the feasibility of developing this new standard?
- Does the Standing Committee have the knowledge and competences to draft this new standard?
- Does the Standing Committee have access to networks through which to review and to promote the standard?

Answers to these questions should help the Standing Committee when it comes to completing the *Standard Development Proposal Form* (see Appendix B).

If there is a consensus that a new standard is needed, the Standing Committee will set up a working group (see 3.4).

3.2 Proposals to review an existing standard

Proposals for the revision of IFLA standards are initiated by the Standing Committee responsible for the standard. It is recommended to evaluate a standard at least every five years after endorsement (see Section 8). The Advisory Committee on Standards / IFLA HQ will monitor the review timetable and send reminders to units to start this process.

The Standing Committee must make a proposal to the Advisory Committee on Standards for one of the following:

- Maintenance of the standard if it is still relevant and does not need updating at the time of review. Minor corrections may be made to the text of the standard. A proposal to maintain the standard with proposed corrections will be submitted and if approved an addition will be made to the statement of endorsement in the title pages of the standard to indicate that it has been confirmed as still current. See Appendix C for the *Minor Revisions Form*.
- Revision of the standard if it appears that it is still needed but requires updating. A proposal will be made using the *Standard Development Proposal Form* and if approved, a working group will be set up by the Standing Committee.
- Withdraw the standard if the standard is no longer relevant.

See also Section 8.

3.3 Standard development proposal form

The proposal form is mandatory for approval of a new standard or for a revision of an existing standard.

If a working group recommends proceeding with the work, it must, in collaboration with its Standing Committee, complete the *Standard Development Proposal Form* and submit it to the IFLA Professional Support Officer. The proposal includes information on the new or existing standard, justification for its creation or update, an outline of the people and groups responsible for the work, as well as the work plan. See Appendix B: *Standard Development Proposal Form* for more information.

The proposal should also include a list of the IFLA committees to be consulted during the development process as well as consultations planned with groups outside IFLA.

The proposal will be evaluated and approved by the Review Team. The following criteria will be used in evaluating the proposal:

- Convincing arguments for the work to be undertaken (need, scope).
- Appropriateness for IFLA to undertake this work and/or lend its name to the final product.
- Consultation process and consideration of IFLA's global membership and interest in standards and guidelines.
- Sufficient resources (expertise within the Working Group and outside resources).
- Timeline.
- Comments on budget proposal.
- Initial plans for the form of publication.

The final decision on the proposal will be communicated to the IFLA Standing Committee and the Advisory Committee on Standards by the IFLA Professional Support Officer. The Advisory Committee on Standards will post information about accepted proposals on its web page with the goal of informing IFLA members and standards organisations of IFLA standards activities. The Standing Committee should post news on its own website that the proposal to start work has been approved and then post regular updates on progress.

When developing a new standard or revising an existing one, the Standing Committee will appoint a working group with the aim of evaluating the feasibility and resources, proposing a plan and timeline, and carrying out the work. Selection of members for the working group should take into account the skills necessary to complete the tasks delegated to the group by the Standing Committee. See section below on working group tasks for more details.

3.4 Working groups

The working group will be composed of experts appointed by the Standing Committee. Experts may include representatives from other IFLA units or external (non-IFLA) bodies as relevant. The selection of members should be open and transparent. The working group should have broad demographic representation from various cultural groups and interests. The recommended size is a maximum of 11 and

a minimum of 5 including a Chair who should be approved by the Standing Committee.

The working group should be able to carry out its work without need for financial compensation. Some expenses may be covered. See section 3.6 on funding.

The working group should report to, and remain responsible to, the Standing Committee that has appointed it.

3.5 Working group tasks

The working group should consider setting up a detailed work plan. The development of a standard can take many years and it is important that a project plan be established and continuously revised.

The working group should maintain regular contact with the Standing Committee that has appointed it. Information about the progress in developing the standard should be widely available through the Standing Committee's website.

The working group shall document the process and the decisions taken in an appropriate tool provided by IFLA.

The working group should seek feedback both from internal IFLA units and from external communities according to the subject.

3.6 Funding

If needed, the Chair of the Standing Committee may make a funding proposal in collaboration with the working group. Planning of the work should not be contingent on project funding and should therefore take into account that such funding may not be granted.

3.7 Communication

The working group should:
- Provide information on the project for the Standing Committee's website. This includes information on the accepted proposal and expected timeline, development progress, names of working group members, contact details.
- Report news and progress on the standard development project, at least annually, to the meeting of the Standing Committee and other committees as appropriate during WLIC and be available for discussion and questions. The task should also be in the Standing Committee's action plan.
- Consult or update other international, national, regional and professional organisations as appropriate.
- Consider creating a blog, wiki, or other communication tool to collect and dispense informal information during the process.

- After publication: Create a news item with a link to the standard in the repository.

3.8 Drafting process

IFLA standards may be drafted in any of the official IFLA languages, or be prepared in a language common to the working group. As the business language of IFLA is English, an English language version of the text is required for discussion, approval and endorsement. It is the responsibility of the working group to identify a suitable translator if the original language is not English, and to verify the quality of the translation. Translations after endorsement are described further in *6.3 Translations after Publication*.

It is important that IFLA standards should provide precise and useful information and guidance to an international audience, so the style in which it is written and the way the document is organised must reflect those aims. It should also be written to have maximum impact. Care and attention should be given to the following aspects:

- Be as comprehensive as possible within the limits specified by the scope of the standard.
- Text should be consistent, clear and accurate.
- Organise the information for greatest impact.
- Complex terms should be defined (for metadata standards, refer to MulDiCat)
- In cases where the subject matter is controversial, efforts should be made to bring out the different views. Refer readers to sources for more complete information.
- Techniques, procedures, models, and theories should be up-to-date.
- Ensure that a review of the language is performed by a person whose native language is that of the standard.
- The IFLA English standard is British English and a style guide is embedded within the Standards' Template. The standard must be understandable without any ambiguity for non-English native speakers.
- Clear examples should be given.

A more technical language will be used in drafting conceptual models, rules for resource description and data encoding schemes. Attention should be given to clear statements and definitions.

In order to advocate firmly for improvement in services and products, guidelines and best practices should accentuate elements that are considered important by:
- Stating their significance and purpose
- Indicating clearly the action(s) that should be accomplished, using "should" to express recommendations; and using "could", "can", "may", and "might" to indicate statements of possibility and capability.

Content for standards should be drafted using the IFLA template, found in Appendix A: *Standards Template*, and follow the guidelines in the *Production Checklist* (see Appendix G).

3.9 Work development process

The Working Group should ensure that other interested or related IFLA committees are given the opportunity to participate in the development of the standard and to comment on successive drafts. The working group should make every effort to contact these groups for comments and incorporate revisions into the next draft. Consultation with other interested parties should continue until the working group considers that the text is acceptable to its target audience.

The Standing Committee should report progress via its annual report, action plan and website. The Professional Support Officer monitors progress and reports on this to the Professional Council. Any significant delays to the timeline should be reported to the Advisory Committee on Standards in case there is an impact on other activities or planning.

3.10 Decision-making

In the process of drafting its standard, the working group will face situations where choices will need to be made about possible courses of action. In IFLA, as with most standards organisations, the consensus method is generally used in order to reach a point where all members can support a particular decision. Consensus decision-making tries to avoid "winners" and "losers" in requiring that the majority approve a course of action as long as the minority of members advocating for an alternate position agrees to go with it. The working group should give particular attention to making sure that diverse views are considered and discussed during the drafting of the standard.

Consensus is defined as a "general agreement, characterised by the absence of sustained opposition to substantial issues by any important part of the concerned interests and by a process that involves seeking to take into account the views of all parties concerned and to reconcile any conflicting arguments. Consensus need not imply unanimity." [2]

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[2] ISO/IEC Directive, Part 1. Procedures for the technical work. Eleventh edition. ISO, 2014

4. Review process

4.1 Review Criteria

The review process should be considered as an audit to ensure that the standard has been drafted according to the stated goals and objectives and that it meets the requirements of the particular standard (e.g. guideline). The following questions could be used by both the working group members and the reviewers to appraise and evaluate the draft standard:

- **Substance**: Why has IFLA issued a standard on this topic? What issue is being addressed?
- **Content:** Is the content adequate and valid for the stated purpose? Have the identified problems/issues/questions been solved/answered by the contents of the standard?
- **Structure:** Has the document succeeded in describing the desired content using a comprehensible structure?
- **Process:** Has the necessary process been followed in organising and compiling the standard?
- **Desired outcome:** Is the outcome likely to contribute to the objectives and achieve the desired impact? What indicators of achievement have been identified to enable objective measurement and evaluation of outcome and impact of the standard?

4.2 Internal IFLA consultation

Once the Working Group has a stable draft, it is important to consult beyond the Working Group and its Standing Committee (or the committees that jointly proposed the standard). The standard will be published as an IFLA standard and therefore should have strong support within IFLA. IFLA committees working in closely related domains should be given the opportunity to provide feedback.

4.3 External Consultations including Worldwide Reviews

Since IFLA standards are intended to be international in scope, it is important to consult beyond IFLA committees. A significant criterion for approval is consultation that is sufficiently broad to ensure that the standard will be well received and supported by relevant communities around the globe. External consultation is also useful for identifying possible gaps or issues with the standard before it is sent for approval and endorsement.

External consultations can take many forms, such as presentations, surveys, requests for comments sent to specific groups or individuals. The broadest consultation is the worldwide review.

4.3.1 External Consultations

Groups external to IFLA, such as major international and national associations or technical bodies on the subject matter, should be consulted. Individuals with internationally recognized expertise can also be contacted.

4.3.2 Worldwide Review

Worldwide reviews are the most appropriate means of consultation for issues or subject matter that are of a wide global nature.

Launching a worldwide review is approved by the Standing Committee. The Standing Committee ensures that the following process is adhered to in a worldwide review:

- Inform the IFLA HQ, through the Professional Support Officer (PSO), on the launching of the worldwide review.
- Invitations for worldwide review should be posted on the IFLA website with announcements on the IFLA listserv and other relevant listservs and communications means.
- Any call for review should be clearly explained and should describe what level of input is expected with an appropriate deadline (for example from 1 to 3 months). In addition, efforts should be made to announce the review in other IFLA official languages, even though comments may be requested in one particular language.
- Comments will be reviewed by the working group and integrated when appropriate. The working group may choose to issue an explanatory document responding to recurrent questions or comments.
- A record should be kept by the Standing Committee of those responding and contributing to the review.
- If extensive revisions are made in response to comments received during the worldwide review, another worldwide review should be undertaken.
- The nature and substance of the worldwide review should be described in the introductory section of the standard. This section may also include, if appropriate, the names of those who contributed to the review so that they may be thanked for their contributions.

5. Approval and Endorsement Process

A formal IFLA review process is undertaken when the Working Group has completed writing or updating the document, made any adjustments required after a worldwide review, and submitted the draft standard for approval and then endorsement.

The standard will be evaluated using the information from the *Standard Approval Request Form* and the *IFLA Standards Procedures Manual*.

Once the final text of the standard is approved by all members of the working group, it is forwarded to the Chair of the Standing Committee responsible for the working group, with a completed *Standard Approval Request Form* (see Appendix D). When the Standing Committee approves the text, the Chair forwards the standard and the form to the Professional Support Officer (PSO). If more than one Standing Committee is involved in proposing and developing the standard, the standard should be approved by all the Standing Committees involved, and one Standing Committee will take the lead in forwarding the standard and joint request for approval.

The Professional Support Officer manages and facilitates all the correspondence and transmission of documents between the bodies involved in the approval process for the standard.

5.1 Approval process

The Review Team is composed of three parts: 1) selected members from the Advisory Committee on Standards, 2) the Chair of Professional Council Chair and 3) the applicable Division Chair. For units without a Division, the Chair of the Advisory Committee on Standards acts as the Division Chair and does not participate in the review by members of the Advisory Committee on Standards.

Members of the Review Team review the draft standard and evaluate it according to set criteria. The criteria cover two main areas: the quality of the content and the process. For the content, the draft standard is expected to meet a level of sufficiently professional quality to be published as an IFLA standard, corresponding to the criteria of the review form. At the same time, the draft standard should also have been developed in line with the processes set out in this Manual, such as a sufficiently broad and appropriate consultation process, given IFLA's global membership, as well as planning for promotion and implementation.

It is expected that the review process will be completed within six weeks, provided that the Review Team is notified of the dates in advance.

Members of the Advisory Committee on Standards are selected to carry out the review and approval on behalf of the Committee. If needed, the Advisory Committee may choose to consult external reviewers who are experts in the standard's subject area to obtain a second opinion that the contents have been presented in an accurate

and balanced way. The evaluations and comments of committee members are compiled into one joint response on behalf of the committee.

Each of the three parts of the Review Team submits a standard review form to the IFLA Professional Support Officer who compiles the results. The recommendation of the Advisory Committee on Standards is weighted at 60%; the recommendations of the Professional Council Chair and the Division Chair are each weighted at 20%. A standard requires the support of the Advisory Committee on Standards in order to be approved.

The review form includes four possible recommendations: approve; approve in principle, subject to minor revisions; revise and re-submit for re-review; or reject. Minor revisions do not include copy editing and formatting.

If there are changes required or if the standard were to be rejected, the Professional Support Officer communicates with the Standing Committee responsible for the standard. When there are no changes to be made, the standard has been approved and is ready to progress to the next step, official endorsement.

Before going for endorsement, the Working Group should refer to the *Production Checklist* (see Appendix G).

5.2 Endorsement process

Once the Review Team approves the new standard, the Professional Support Officer (PSO) sends the document to the Professional Council with the Review Team's recommendation to endorse it. The Professional Council endorses the standard on behalf of IFLA and informs the Governing Board. The PSO keeps the units involved up-to-date with the progress of the approval process.

The endorsement is quickly communicated to the Standing Committee and the Advisory Committee on Standards. Once the standard is endorsed, the Working Group should again refer to the *Production Checklist* (Appendix G) for the relevant final steps required prior to publication. The IFLA HQ will publish the standard in the IFLA repository, making it official.

To ensure that standards are kept up-to-date, the Advisory Committee on Standards informs the Standing Committee when a review of the standard should be completed (see 8, *Review and Revisions for Keeping Current*).

6. Publication

6.1 Copyright

In accordance with IFLA's endorsed open access and copyright policy, all standards and guidelines are published as open access, with a Creative Commons Attribution 4.0 International license. This permits the widest possible dissemination of standards and guidelines to IFLA members and the library community. A less restrictive license (such as CC0) may also be chosen. This license type is also suitable for normative standards, or related projects such as Namespaces.

6.2 Publication formats

Standards and guidelines may be published in the following formats:
- **Draft documents** may be published openly on an IFLA website, so long as the draft status of the document is clearly noted. Drafts do not need to adhere to the template, and in fact, may benefit from appearing to be a less formal document. Drafts should be withdrawn once the finalised version has been endorsed.

- **Endorsed standards** are published on the IFLA repository by IFLA HQ. The IFLA Standards website will include a link to the standard in the repository. IFLA units may also include links on their websites.

- Explanatory documents, case studies, or implementation guides may be published as Professional Reports or as supplementary documents on the unit's website.

All standards should be listed on the IFLA Standards website. Whenever appropriate, standards with linked data aspects should also be published in the IFLA Namespaces . IFLA Namespaces are a key initiative to give IFLA standards an appropriate and needed visibility and to ensure the broadest possibilities of dissemination and use. The Standing Committee is encouraged to consult LIDATEC to check whether publication in the IFLA Namespaces would be appropriate.

6.3 Translations after Publication

IFLA has a network of language centres for its official languages, and volunteers also translate documents into other languages. However, in the case of standards, especially normative documents, it may be preferred that subject experts translate the documents even when the target language is one of IFLA's official languages. Translated documents should include a statement with the name of the translator(s), their organisation, and a disclaimer. For more details, see Appendix F.

Translators should ensure that as much of the original text as possible is translated including title page data, headings, footnotes, graphs/tables and image labels. The

images, tables, graphs, etc. must be pasted back into the correct position in the text. The alternative text for the images is also translated.

Further information about IFLA's language and translation policy can be found at: www.ifla.org/language-policy.

7. Dissemination and Implementation

To ensure broad adoption of the new standard, the responsible Standing Committee should implement its strategy for communication, dissemination and support for implementation.

Some examples:
- A communications plan suggested by the IFLA Communications Team.
- Explanatory documents, case studies or implementation guides.
- Workshops or training materials.
- *IFLA Journal* or other journal articles.
- Conference programmes.
- Frequently Asked Questions (FAQs) on the IFLA unit's webpage.

Considerations should be given to social, cultural and language conditions when discussing the standard.

Following the publication of a standard, a unit may also monitor or otherwise assess interest in the new standard and the level of adoption or implementation.

8. Review and Revisions for Keeping Current

All standards should be reviewed at the latest every five years after endorsement or the last review. Reviews earlier than five years may be considered if needed.

Every five years, the Advisory Committee on Standards expects to hear from the committee responsible for the standard to confirm whether the standard will be maintained (with or without minor corrections), revised or withdrawn. The committee designated as responsible for the current version will normally perform the review. See also section 3.2.

The Standing Committee is responsible for ensuring that the standard is reviewed for relevance and validity. It may be advisable for the responsible committee to conduct surveys or other research to evaluate the use and impact of the standard.

The unit communicates its decision to the Advisory Committee on Standards on whether the standard will be:
- maintained (the standard remains valid and relevant)
- revised
- withdrawn

When the decision is to revise the standard, the Standing Committee will also start work on the *Standard Development Proposal Form.* If a revision takes longer than one year, an indication should be made on the website that the standard is under revision.

A standard that is withdrawn shall be archived and accessible for research, with clear indication of its status. Previous versions of standards shall also be archived and accessible for research and clearly indicate that they are superseded by a revised version.

8.1. Maintaining a standard

If the Standing Committee decides that the standard remains valid and relevant, it should make a proposal to the Advisory Committee on Standards, detailing why the standard is still relevant and does not need revision. Minor corrections may be made to the text of the standard or to the links, with an editorial note describing the changes (see Appendix C, *Minor Revisions Form*).

The proposal to maintain the standard with or without proposed corrections will be submitted to the Advisory Committee on Standards and if the Committee agrees with the proposal, the standard will be registered as reviewed and will come up for review again, at maximum, after five more years. If there are corrections or amendments made at this stage, the changes are approved by the Standing Committee and forwarded to the Advisory Committee on Standards for information. The Advisory Committee reserves the right to ask the Standing Committee to change its proposal

to a revision proposal if it judges that the changes are significant. Otherwise, a statement on corrections and amendments is added to the title page of the standard.

8.2. Revision

If the Standing Committee decides to revise a standard, it should complete and submit the *Standard Development Proposal Form* (see Section *2.4* and also Appendix B). The proposal will include a project plan and timetable and indicate the nature of changes. The Chair of the Standing Committee forwards the proposal to the Professional Support Officer (PSO) who sends it to the Review Team. When the Review Team s supports the proposal, the proposal is forwarded to the Professional Council for approval. Work on the revision should not begin before approval by the Professional Council.

8.3. Withdrawal

If the Standing Committee decides to withdraw a standard, it should make a proposal to the Advisory Committee on Standards detailing why the standard is no longer relevant or why a revised standard is not possible. If the Advisory Committee on Standards agrees with the proposal, it will make a recommendation to the Professional Council that the standard be withdrawn. The standard will remain available on the IFLA website, but with a clear indication that the standard has been withdrawn by IFLA and is no longer deemed current.

9. Appendices

Downloadable versions of the template and forms are available through the Officer Basecamp.

Appendix A: Standards Template & Style Guide

Appendix B: Standard Development Proposal Form (new standard or major revision)

Appendix C: Minor Revisions Form

Appendix D: Standard Approval Request Form

Appendix E: Forms used by the Review Team

- **Standard Proposal Review Form**

- **Summary of Standard Proposal Reviews**

- **Standard Review Form**

- **Summary of Standard Reviews**

Appendix F: Translations

Appendix G: Production Checklist

Appendix H: Versioning Guidance

Appendix I: Standard Development Process Flowchart

Draft Title

The title must be significant and explain the content of the document. If an acronym is used, it must be followed by the expanded text.

Responsibility statement (Authors and other contributors)

The document must present a clear statement of responsibility.
Edited by:, With contributions from:, and the IFLA units (Section, SIG, working group or Division) may be included in this statement.

Edition and revision statement (if not the first edition)

Date (month and year)

Use as appropriate: Version details, or [Not yet] Endorsed by the IFLA Professional Committee or Governing Board.

Language (for example, Russian) Translation/ (indicate this in English as well as in the language of the translation)

Translated by: Name and basic details of the translator.
Certificate (if translation has been independently certified).
Date of translation: (month and year).

The text of this document has been translated into **[language]** and differences from the original text may occur. This translation is provided for reference purposes only.

IFLA
Prins Willem-Alexanderhof 5
2595 BE The Hague
Netherlands

www.ifla.org

Table of Contents

NB: Use formatted headings so the table of contents can be created automatically and easily updated. Page numbers start **after** the Table of Contents

Introduction/Preface

At the beginning of the document, may be useful to have an introduction and/or preface explaining,
- Background (creation or revision process in detail);
- Scope of the document, including, the problem addressed, the goal of the document;
- Intended audience;
- Acknowledgements (or in a separate section if necessary – see below).

Chapters/Sections

Each main issue should be discussed in individual chapters (numbered).

For each issue, an action should be proposed (i.e., recommendations, suggestions, etc.)

Depending on the length of the document and issues discussed, a list of recommendations should be added at the end of the document.

Subchapter heading 2

Use Heading 2 for a sub-chapter.

Sub-subchapter heading 3

Use Heading 3 for a sub-sub-chapter. Preferably don't use more than 3 heading types. If it's necessary to use a fourth heading, then the table of contents will need editing.

The sections should also include when relevant:
- Glossary
- References
- Bibliography
- Index
- Appendices.

Appendix A

Appendix B: Standard Development Proposal Form (new standard or major revision)

Standard Development Proposal Form

Please use this form to propose a **new** standard or guideline or a **major revision**

	Responses
Proposed standard information	
● Working title of Standard	
● Is this a new standard or a major revision	New Standard Major Revision
● Known existing standard (by IFLA or external body)	
● Do you propose any changes to the normal publication format and distribution? IFLA Standards and guidelines are published as PDF, CC BY 4.0 license, Online-only	
Responsibility	

	Responses
● Name of the Committee with primary responsibility for the standard	
● For revisions, is this Committee different from any Committee responsible for a previous edition of the standard? If so, indicate which Committee had previous responsibility	
● Which other IFLA Committees will be involved in or consulted during the writing of the standard?	
● Indicate people or groups outside IFLA who will be consulted or otherwise involved.	
● Name, email address of person with overall lead responsibility and relationship to IFLA.	
● Names of members of the working group who will work on the standard with indication of	

	Responses
roles during the development and expertise in the subject area	
Justification	
● Statement on the perceived need for this new standard / revision	

● For new standards:
  ● Is there a need for an international standard in this area?
  ● How would this standard improve or complement other standards?	

● Scope of coverage / application (detail what the aims of this new standard will be or what the revision will aim to do)	
● Who is the audience for the standard?	
● Is IFLA the best organisation to elaborate and publish this standard?	

	Responses
• Relationship to other standards?	
Workplan	
• Development time frame (detailing steps and deadlines)	
• Communications and promotion plans to ensure that relevant audiences will know about the new/revised standard.	
• How will implementation be supported (for example, training, gathering of feedback, assessment of impact)?	
• Budget: If submitted by a Professional Unit, does the lead unit plan to submit a PC Funding Proposal? If so, please briefly indicate details - what funds are needed for and an estimate of the amount. NB: Planning of the work should not be contingent on project funding and should take into account that such funding may not be granted.	

Authorisation	*Name	Date
Person with overall lead responsibility		
Officers of the committee with lead responsibility		
The Chair of the Division or body to which the proposing committee belongs		

*A printed name represents the signature for the purposes of submitting this proposal.

Please return this completed form to the Professional Support Officer - professionalsupport@ifla.org

Appendix C: Minor Revisions Form

▦ Proposal for Standard Minor Revisions

Please use this form to record minor revisions. Minor revisions are:
- Updated links
- Minor copy edits
- Change in terminology
- Errata

For major updates (e.g., content, data) please complete and submit the Standard Proposal Form

Standard information	Responses
1. Existing name of standard	
2. Changes to requested name and or versioning	
3. Date and person who approved minor revisions	

Indicating minor revisions

You may indicate requested minor revisions in one of two ways:
1. Submit a word document, which includes tracked changes. Please include reasons for revision using the comments feature. Please contact the Professional Support Officer for the most recent version of the document.
2. Complete the table below indicating existing text and requested changes; the committee responsible for the standard has the option to recommend that the revisions to the document be carried out by the committee.

Location: Page number/ Paragraph number/ Table or Chart	Existing text	Revised text	Reason for revision

Authorisation	*Name	Date
Person with overall lead responsibility		
Officer(s) of the committee with lead responsibility		
The Chair of the Division to which the proposing committee belongs; (for units not belonging to a Division, the Chair of the Advisory Committee on Standards)		

*A printed name represents the signature for the purposes of submitting this proposal.

Please return this completed form to the Professional Support Officer professionalsupport@ifla.org along with the draft standard document.

Appendix D: Standard Approval Request Form

Standard Approval Request Form

Please use this form when your draft standard is ready to be submitted for review.

Proposed standard information	Responses
1. Final title of Standard	
2. Known existing related standard (by IFLA or external body).	
3. Do you propose any changes to the normal publication format and distribution? IFLA Standards and guidelines are published as PDF, CC BY 4.0 licence, Online-only.	
Responsibility	
4. Name of the Committee with primary responsibility for the standard.	
5. Which other IFLA committees were involved in or consulted during the writing of the standard?	

6. Which people or groups outside IFLA were consulted or otherwise involved? Indicate how?	
7. Name, email address of person with overall lead responsibility and relationship to IFLA (if any).	
8. Final (full) list of names who contributed to the Standard.	
Justification	
9. Indication of changes to the need, scope or audience since submission and approval of the proposal form.	
Promotion and implementation	
10. Communications and promotion plans to ensure that relevant audiences will know about the new/revised standard.	
11. How will implementation be supported (for example, training, gathering of feedback, assessment of impact)?	

12. Are there any outstanding budget reimbursement claims at the time of submitting this form?	
13. Are there any deadlines you would like to request the final endorsement process to meet? If so, please indicate the date and reason.	
14. Desired or planned format of publication	

Authorisation	*Name	Date
Person with overall lead responsibility.		
Officer(s) of the committee with lead responsibility.		
The Chair of the Division or body to which the proposing committee belongs.		

*A printed name represents the signature for the purposes of submitting this proposal.

Please return this completed form and the initial Standard Development Approval Form to the Professional Support Officer professionalsupport@ifla.org along with the draft standard docume

Appendix E: Forms used by the Review Team

IFLA Standard Proposal Review Form – For Review Team

Please use this form to review the proposal for a new or major revision of a standard or guideline.

Membership of the Review Team

Development proposals for new standards or major revisions of standards will be evaluated by a Review Team, comprising:
- The Chair of the Division to which the proposing committee belongs (for units not belonging to a Division, the Chair of the Advisory Committee on Standards)
- The Chair of Professional Council The Chair of the Advisory Committee on Standards (COS), in consultation with other appropriate members from the Committee;

The review process will be overseen by the Professional Support Officer at IFLA HQ

Timeline for the review process – 6 weeks

- Development proposals will be sent to the Review Team **within one week** of receipt.
- Each reviewer should return their completed review form to the Professional Support Officer **within two weeks** of receiving the proposal for review.

NB: The Committee on Standards will return one form with synthesised responses from the COS review team.
- The Professional Support Officer will collate (without edits) the Review Team's feedback and present the final results and recommendation to the Chair of the Committee on Standards for approval, **within one week** of receiving the final review.
- The Chair of the Committee on Standards will return the approved summary **within one week**.
- The IFLA Professional Support Officer will communicate the decision on the development proposal to the Officers of the proposing committee and the person who has lead responsibility for the work, **within one week**.

Rating

A score of 1 to 3 (3 = Exceeds; 2 = Meets; 1 = Does not meet; 0 = not present) will be given for each criterion, with a total overall score.

Recommendation

Each reviewer will give one of the following recommendations.
- Approve
- Approve in principle, subject to minor revisions (not to include copyediting revisions)
- Revise and re-submit for re-review
- Reject

If the recommendations of the Review Team differ, the recommendation of the Advisory Committee on Standards will be weighted at 60%.

Name of Standard:	
If resubmission, date last reviewed:	
Name of Reviewer:	
Date:	

Quality and relevance of the proposal	Rating	Comments
1. Appropriateness of the title and publication format of the proposed Standard.		
2. Evidence of an effective consultation process that is appropriate to the work and takes into consideration IFLA's global membership. It should include consultation with the Standing Committee, other relevant IFLA committees and external bodies.		
3. Convincing arguments and justification for the proposed Standard.		
4. Appropriateness for IFLA to undertake this work and/or		

lend its name to the final Standard.		
Quality of the work plan		
5. A convincing, realistic and effective time frame for the work.		
6. Evidence that there are sufficient resources to undertake the work, for example, appropriate expertise.		
Communications		
7. An effective promotions plan and plan for follow-up implementation of the Standard.		
Overall score and Recommendation		

Please return this completed form to the Professional Support Officer - professionalsupport@ifla.org

Standard Proposal Review Summary – For Review Team

This is a collation of the reviews submitted by the Review Team for this proposal.

Membership of the Review Team

Development proposals for new standards or major revisions of standards were evaluated by a Review Team, comprising:

- The Chair of the Division to which the proposing committee belongs (for units not belonging to a Division, the Chair of the Advisory Committee on Standards)
- The Chair of Professional Council
- The Chair of the Advisory Committee on Standards (COS), in consultation with other appropriate members from the Committee; when the COS Chair must act in the role of Division Chair, the review is completed by the other members of COS.

The review process is overseen by the Professional Support Officer at IFLA HQ

Timeline for the review process – 6 weeks

- Development proposals will be sent to the Review Team **within one week** of receipt.
- Each reviewer should return their completed review form to the Professional Support Officer **within two weeks** of receiving the proposal for review.

NB: The Advisory Committee on Standards will return one form with synthesised responses from the COS review team.

- The Professional Support Officer will collate (without edits) the Review Team's feedback and present the final results and recommendation to the Chair of the Advisory Committee on Standards for approval, **within one week** of receiving the final review.
- The Chair of the Advisory Committee on Standards will return the approved summary **within one week**.
- The IFLA Professional Support Officer will communicate the decision on the development proposal to the Officers of the proposing committee and the person who has lead responsibility for the work, **within one week**.

Rating

A score of 1 to 3 (3 = Exceeds; 2 = Meets; 1 = Does not meet; 0 = not present) was given for each criterion, with a total overall score.

Recommendation

Each reviewer gave one of the following recommendations:
- Approve
- Approve in principle, subject to minor revisions (not to include copyediting revisions)
- Revise and re-submit for re-review
- Reject

If the recommendations of the Review Team differ, the recommendation of the Advisory Committee on Standards will be weighted at 60%.

Name of Standard:	
Date:	

Quality and relevance of the proposal	Rating	Comments
1. Appropriateness of the title and publication format of the proposed Standard.		
2. Evidence of an effective consultation process that is appropriate to the work and takes into consideration IFLA's global membership. It should include consultation with the membership of the Standing Committee, other relevant IFLA committees and external bodies.		
3. Convincing arguments and justification for the proposed Standard.		
4. Appropriateness for IFLA to undertake this work and/or lend its name to the final Standard.		
Quality of the work plan		
5. A convincing, realistic and effective time frame for the work.		

6. Evidence that there are sufficient resources to undertake the work, for example, appropriate expertise.		
Communications		
7. An effective promotions plan and plan for follow-up implementation of the Standard.		
Overall score and Recommendation		

*When there is a request to revise and resubmit, the proposing committee should send the a response to the Review Summary to the Professional Support Officer along with the resubmission.

The response can be included below, and should indicate generally where the review team's guidance was followed and, if there were suggested changes the proposing committee chose not to make, information about those decisions. This response will be included along with the resubmission for review sent to the review team.

Standard Review Form – For Review Team

Please use this form to review a submitted draft or major revision of a standard or guideline.

Membership of the Review Team

New and revised standards will be evaluated by a Review Team, comprising:
- The Chair of the Division to which the proposing committee belongs (for units not belonging to a Division, the Chair of the Advisory Committee on Standards)
- The Chair of Professional Council The Chair of the Advisory Committee on Standards (COS), in consultation with other appropriate members from the Committee; when the COS Chair must act in the role of Division Chair, the review is completed by the other members of COS.

The review process will be overseen by the Professional Support Officer at IFLA HQ.

Timeline for the review process – 6 weeks (provided that the Review Team is notified of the dates in advance)

- Draft standards will be sent to the Review Team **within one week** of receipt.
- Each reviewer should return their completed review form to the Professional Support Officer **within two weeks** of receiving the proposal for review.

NB: The Advisory Committee on Standards will return one form with synthesised responses from the COS review team.
- The Professional Support Officer will collate (without edits) the Review Team's feedback and present the final results and recommendation to the Chair of the Committee on Standards for approval, **within one week** of receiving the final review.
- The Chair of the Committee on Standards will return the approved summary **within one week**.
- The IFLA Professional Support Officer will communicate the decision on the draft Standard to the Officers of the proposing committee and the person who has lead responsibility for the work, **within one week**.

Rating

A score of 1 to 3 (3 = Exceeds; 2 = Meets; 1 = Does not meet; 0 = not present) will be given for each criterion, with a total overall score.

Recommendation

Each reviewer will give one of the following recommendations.

- Approve
- Approve in principle, subject to minor revisions (not to include copyediting revisions)
- Revise and re-submit for re-review
- Reject

If the recommendations of the Review Team differ, the recommendation of the Advisory Committee on Standards will be weighted at 60%.

Name of Standard:	
If a resubmission, date of last review:	
Name of Reviewer:	
Date:	

Quality and relevance of the standard	Rating	Comments
1. Appropriate presentation of the Standard • appropriateness of title • appropriateness of publication format • a comprehensible structure to the content • content that is sufficient for fulfilling the stated purpose of the standard?		
2. Accuracy and consistency of language and concepts.		
3. Clear articulation of the scope and need for the standard.		
4. A sufficiently broad and appropriate consultation process, given IFLA's global membership		
5. A level of quality sufficiently high for IFLA to publish the Standard under its brand		
Communications		

6. A clearly defined audience/readership for the Standard		
7. A realistic and appropriate promotions plan and plan for follow-up implementation of the Standard.		
Rating and Recommendation		

Please return this completed form to the Professional Support Officer - professionalsupport@ifla.org

Standard Proposal Review Summary

This is a collation of the reviews received by the Review Team for this standard.

Membership of the Review Team

New and major revisions of this standard were evaluated by a Review Team, comprising:
- The Chair of the Division to which the proposing committee belongs (for units not belonging to a Division, the Chair of the Advisory Committee on Standards)
- The Chair of Professional Council The Chair of the Advisory Committee on Standards (COS), in consultation with other appropriate members from the Committee; when the COS Chair must act in the role of Division Chair, the review is completed by the other members of COS.

The review process is overseen by the Professional Support Officer at IFLA HQ

Timeline for the review process – 6 weeks (provided that the Review Team is notified of the dates in advance)

- The draft Standard will be sent to the Review Team **within one week** of receipt.
- Each reviewer should return their completed review form to the Professional Support Officer **within two weeks** of receiving the standard for review.

NB: The Committee on Standards will return one form with synthesised responses from the COS review team.
- The Professional Support Officer will collate (without edits) the Review Team's feedback and present the final results and recommendation to the Chair of the Committee on Standards for approval, **within one week** of receiving the final review.
- The Chair of the Advisory Committee on Standards will return the approved summary **within one week**.
- The IFLA Professional Support Officer will communicate the decision on the development proposal to the Officers of the proposing committee and the person who has lead responsibility for the work, **within one week**.

Rating

A score of 1 to 3 (3 = Exceeds; 2 = Meets; 1 = Does not meet; 0 = not present) was given for each criterion, with a total overall score.

Recommendation

Each reviewer gave one of the following recommendations:

- Approve
- Approve in principle, subject to minor revisions (not to include copyediting revisions)
- Revise and re-submit for re-review
- Reject

If the recommendations of the Review Team differ, the recommendation of the Advisory Committee on Standards will be weighted at 60%.

Name of Standard:	
Date:	

Quality and relevance of the standard	Rating	Collated Comments
1. Appropriate presentation of the Standard • appropriateness of title • appropriateness of publication format • a comprehensible structure to the content • content that is sufficient for fulfilling the stated purpose of the standard?		
2. Accuracy and consistency of language and concepts.		
3. Clear articulation of the scope and need for the standard.		
4. A sufficiently broad and appropriate consultation process, given IFLA's global membership		
5. A level of quality sufficiently high for IFLA to publish the Standard under its brand		
Communications		
6. A clearly defined audience/readership for the Standard		
7. A realistic and appropriate promotions plan and plan for follow-up implementation of the Standard.		
Rating and Recommendation		

*When there is a request to revise and resubmit, the authoring committee should send the response to the Review Summary to the Professional Support Officer along with the resubmission.

The response can be included below, and should indicate generally where the review team's guidance was followed and, if there were suggested changes the authoring committee chose not to make, information about those decisions. This response will be included along with the resubmission for review sent to the review team.

Appendix F: Translations of Unit publications

Unit Publications endorsed by the IFLA PC or GB (Reports, Guidelines, Manifestos et al.)

Official IFLA Languages

- When the PC or GB endorse a Unit publication, a request for its translation into the 6 other IFLA languages will be automatically requested by IFLA HQ. NB: As of June 2023 we are experiencing difficulty obtaining German, French and Russian translations.
- Once received, these translated publications will be uploaded to the IFLA Repository by IFLA HQ.

Other Languages

Translation of these publication types into other languages is managed by the Unit. Units should first view this list, to ensure a translation request has not already been made and is not already underway. Please inform the Professional Support Officer when you have arranged for a translation, so that it can be added to this list.
- Translators should use the existing document as a template for translation.
- Translators should provide a translation of the Repository abstract.
- Translators should include the names of authors in both the Roman alphabet and, when available, the alphabet of the translation.
- To be included in the IFLA Repository, the translation must carry a CCBY 4.0 license.
- A translator statement should be included on the verso: **I confirm that the [language] translation accurately reflects the content and meaning of the [language] original.**

Once the Unit has received the translation, they should send the MS Word version to the Professional Support Officer. The translation will be uploaded to the IFLA Repository by IFLA HQ.

Other Unit publications (Toolkits, brochures, definitions, event materials et al.)

Translation of these publication types is managed by the Unit. The Committee member responsible will upload translations into the IFLA Repository. The document that explains how can be accessed in the Communications Basecamp.

Existing Publications (Reports, Guidelines, Metadata Standards)

Individuals should contact the Unit to confirm that the standard is not currently being revised or planned for revision, prior to seeking translation.

Appendix G: Production checklist for IFLA publications

Production

- Authors should produce the publication (guideline, standard or report) using the template provided. The templates can be accessed in the Officer Basecamp.

Editing before endorsement – by the Unit

Authors should submit the publication (guideline, standard or report) in a print-ready format. The following items should be verified prior to submission for endorsement:
- ✓ Hyperlinks are active
- ✓ Links to any IFLA or Unit publications should utilise a Repository URL, not to a PDF of the document.
- ✓ Publication language uses British English spelling and grammar conventions.
- ✓ Paper size is A4
- ✓ Page 1 of the document begins after the table of contents
- ✓ Formatting is consistent with the template:
  - o font, style, spacing, margins

Editing before endorsement – by IFLA HQ

- IFLA HQ verifies formatting and layout and sends back to authors for any edits.

Required for publication

A publication is considered as "published" once it has been uploaded to the IFLA Repository. The following are required prior to publication:

- ✓ Author permission forms submitted to Professional Support Officer
- ✓ 50-150 word publication summary for the Repository entry
- ✓ 150-300 word article for the IFLA website/newsletter
- ✓ Requests for ISBN (if required) – NB: for Professional Reports only

After endorsement – IFLA HQ

- Final review of the document
- Endorsement statement added to the verso
- Conversion from MS Word version to accessible PDF
- Publication is uploaded to the IFLA Repository
- A request for translations in the official IFLA languages is made (if necessary)

After publication

Once published…
- IFLA HQ will upload publication translations which are endorsed by the Governing Board or Professional Council, to the IFLA Repository
- The Unit is responsible for uploading translations of any other unit material (e.e., Event materials, newsletters)

Appendix H: Versioning Guidance

To be developed

IFLA Standards

The process IFLA committees follow to create standards and guidelines.

STEP 01 — The Proposal

- An IFLA committee evaluates the need for a new standard or the revision of an existing standard.
- The committee submits the appropriate proposal form (Form A)
- The Review Team reviews the proposal.
- If approved, move to step 2. If not approved, the committee revises and resubmits, if appropriate.

STEP 02 — The Development

- Draft the standard
- Include broad internal (IFLA committee) and external (related bodies) consultation.
- Review and revise the draft based on feedback
- Submit the draft and the appropriate forms (Form B)

STEP 03 — The Review

- The standard or guideline is reviewed against the criteria by the Review Team
- The Review team usually consists of:
    - The Professional Council Chair
    - The Division Committee Chair
    - 3-4 members of the Committee on Standards

STEP 04 — Evaluation & Recommendation

- The Review team reviews the standard or guideline
- A determination is registered of approved, approved with revisions, or a request for revision and resubmission.

STEP 05 — Endorsement, Publication, Dissemination, Implementation

- Approved standards move to the Professional Council for endorsement.
- Standards are edited, formatted and published to the IFLA Repository as a resource for the field.
- Committees review their standard every 5 years and determine maintenance, revision, or withdrawal of the Standard.

Document Information & Version Control

Date first approved: August 2023	Date of effect: December 2023	Date last amended: (refer to Version Control Table)	Date of Next Review: TBD
First Approved by:	Advisory Committee on Standards		
Custodian title & e-mail address:	IFLA Professional Support Officer professionalsupport@ifla.org		
Author:	IFLA Advisory Committee on Standards		
Responsible Division & Unit:	IFLA Advisory Committee on Standards		
Supporting documents, procedures & forms:	Embedded		
Relevant Legislation & External Documents:	None noted		
Audience:	IFLA Volunteer Committees		
Replaces:	IFLA Standards Manual 2014		

Version Control

Version	Date Effective	Approved By	Amendment
1.0	22 December 2023	IFLA Advisory Committee on Standards	Initial publication