

Guide to Developmental Review of New or Substantially Changed Standards

Version 2 (December 2020)

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1 Introduction

This guide provides information about when and what materials should be submitted for developmental review to ASME C&S Publishing (C&S Pubs).

The goal of the developmental review process is to allow a Committee to see suggested, desirable, or required editorial modifications and requested clarifications before the Committee finalizes its manuscript for submission to the Standards Committee, C&S Pubs, public review, and ANSI. Because of the work done during developmental review, the finalized draft should have fewer Standards Committee comments and the manuscript should need only high-level copyediting (i.e., editing for style, spelling, minor grammar issues, XML issues) when it is submitted to C&S Pubs for production. In addition, there should be no complicated queries or suggested rewrites during subsequent stages of production (e.g., review of rough proofs and first proofs). Fewer queries and suggested revisions equal faster review and approval of proofs, and thus a faster time to press.

In this guide, the term “draft document” refers to any content (new Standard, rewritten chapter, substantially revised table, etc.) submitted to C&S Pubs for developmental review.

2 Criteria for Undergoing Developmental Review

Staff Engineers should submit the following draft documents to C&S Pubs for developmental review:

- new C&S Publications (Standards, Technical Reports, Guidelines, etc.)
- rewrites of existing Codes or Standards
- new or substantially revised Cases
- major revisions and additions, which include
 - reorganization/renumbering of the majority of the content (chapters, paragraphs, figures, tables, etc.) within a Code or Standard
 - a new or substantially revised chapter (or similar, chapter-like element, e.g., article, part, section, appendix)
 - revisions that affect the structure of a table, e.g., reorganization of columns/rows or table notes; addition of new columns/rows; or addition of new categories of data, such as equations or figures, to the table. Simple revisions of the data contained within existing table cells do not require developmental review.

Routine revisions to paragraphs, tables, or figures do not require a developmental review, but the Staff Engineer may contact the Managing Editor or Assistant Managing Editor of C&S Pubs for input if they have questions about the need for a developmental review, or about style, grammar, etc. Staff engineers and Committee members may also find guidance in the C&S Writing & Style Guide available on C&S Connect (<https://cstools.asme.org/csconnect/CommitteePages.cfm>) under “ASME Policies, Procedures, & Guidelines,” or use this link for a direct [PDF download of the C&S Writing Guide & Editorial Style Guide](#).

3 Timing of Developmental Review

The Staff Engineer should plan to have the developmental review process (see para. 5) completed prior to Standards Committee balloting. The Staff Engineer may contact the Managing Editor or Assistant Managing Editor of C&S Pubs if he/she has questions about the timing of the developmental review.

The developmental review process takes a few weeks to a few months, depending on the length and complexity of the draft document; the availability and workload of the editorial staff; the publications priority list; and Committee feedback and response time. For example, the developmental review process for a new or rewritten Standard would take approximately three months (see table below) while that for a structurally revised table would take approximately a week. See para. 5, “Developmental Review Process.”

**Example Timetable for Developmental Review
of a New Standard (120-page Word Document)**

Action	Time to Completion
Editor edits the draft document	1 month
Committee reviews the edited draft document and returns it to the Staff Engineer, who then submits it to the Editor	1.5 months
Editor reviews/finalizes the Committee-reviewed draft document and returns it to the Staff Engineer	2 weeks

4 Developmental Review Milestones

4.1 Review of Scope and Outline. For new C&S Publications and rewrites or reorganization/renumbering of existing Codes and Standards, the Staff Engineer should submit a general description of the content (e.g., the scope) and an outline (i.e., the planned table of contents showing titles and first- and second-level headings) to the Managing Editor of C&S Pubs as soon as the Committee has drafted these elements. The Managing Editor or Assistant Managing Editor will provide feedback within two to three days.

4.2 Notice to C&S Pubs of Developmental Review Draft. For new C&S publications and rewrites of existing Codes and Standards, the Staff Engineer should provide one-month advance notice, via email, to the Managing Editor of C&S Pubs that he/she is planning to submit a draft document for developmental review. While approval by the associated C&S Director to undergo a developmental review is not required, it is recommended that the Director be carbon copied on this notification email. The email should include the title of the draft document, its expected length (e.g., expected number of Word.docx pages), and the expected date of submission for developmental review.

4.3 Submittal of Developmental Review Draft to C&S Pubs. The Staff Engineer should submit the draft document to the Managing Editor of C&S Pubs (see para. 3 for guidance on timing of developmental review). The content that should be submitted for developmental review is as follows:

- For new C&S publications, rewrites of existing Codes and Standards, and new or substantially revised Cases, the draft document should include all chapters/parts/sections, appendices, paragraphs, tables, figures, etc., that will be part of the final manuscript. If a draft document is near completion (e.g., an appendix or several figures are still to come), the Staff Engineer may submit the draft document to C&S Pubs, but the Managing Editor will determine whether to accept it for developmental review or require that it be completed before developmental review.
- For major revisions and additions, the Staff Engineer should submit only the affected element (table, figure, or new/revised/renumbered chapter, article, section, appendix) for developmental review.

Microsoft Word is the preferred format for submission of text and tables. The Staff Engineer should contact the Managing Editor or Assistant Managing Editor with questions about other formats (e.g., PDF markup, Excel files).

The Staff Engineer may contact the Managing Editor or Assistant Managing Editor at any time during the Committee's writing of the draft document with questions about structure, grammar, style, etc.

5 Developmental Review Process

- (1) Staff Engineer submits title and draft TOC, if applicable (see para 4.1), to C&SPubs.
 - (2) Staff Engineer submits one-month notice of developmental review, if applicable (see para. 4.2.), to C&SPubs, with CC to associated C&S Director.
 - (3) Staff Engineer emails the draft document to Managing Editor of C&SPubs.
 - (4) Managing Editor reviews and assigns the developmental review to an Editor.
 - (5) Editor performs the developmental review, which includes reviewing/revising structure and paragraph/table/figure-numbering scheme, and editing for clarity and sense (i.e., suggested rephrasing, rewriting). Editor inputs all editorial corrections, suggested rephrasing, and queries for the Committee using MS Word's "Track Changes" or "Comment" tools.
 - (6) Editor returns to the Staff Engineer the edited draft document containing editorial recommendations and corrections, and other feedback. The Editor may choose to meet with the Staff Engineer and/or request a teleconference with Committee members to discuss the provided feedback.
 - (7) Committee reviews the edited draft document. The Committee must do the following:
 - Review all editorial corrections shown in Track Changes. If changes are acceptable, Committee leaves the Track Changes in place. If changes are not acceptable, Committee revises the affected text using Track Changes or proposes alternative changes using the Comment tool. Committee does NOT use the Track Changes "Accept" or "Reject" function to accept or reject any of the Editor's Track Changes.
 - Respond to all queries shown in Comment boxes.
 - Propose alternatives to any declined recommendations shown in Comment boxes.
 - Use Track Changes to input any new paragraphs, tables, or other text not previously included in the draft document. Any new work accepted by the Committee while the Editor is working on the developmental review must be added to the existing developmental-review draft document.
- At any point during the review of the edited draft document, the Staff Engineer and/or the Committee members may request a meeting or teleconference with the Editor to discuss the Editor's feedback.
- (8) Staff Engineer returns the reviewed draft document to Editor.
 - (9) Editor reviews Committee's responses, edits new material (if any), and follows up with Staff Engineer concerning remaining or additional queries (if any) until all outstanding issues are addressed.
 - (10) Editor returns the draft document to the Staff Engineer, with all Comment boxes and Track Changes still in place. This signals the end of the developmental review process. At this point, the Staff Engineer may choose to accept Track Changes, delete Comment boxes, etc., to provide a "clean" document to the Committee.

The Committee uses the developmentally reviewed draft document as the latest version of the proposal.

Throughout the developmental review process, the Staff Engineers will act as liaison between the Committee and C&S Pubs. Although direct communication between C&S Pubs and the Committee is often useful, the Staff Engineer must be included in all communication.

Appendix A

Document Information

General	
Title	Guide to Developmental Review of New or Substantially Changed Standards
Owner (Individual)	Publishing
Owner (Department)	Publishing
Contributor(s)	
Approver(s)	Review by Directors and Approved by MD or Senior Director Standards
Users	All Standards Development Staff
Access Levels	Staff, committee members and public
Review Cycle	Yearly
Date of Next Review	December 2021
Repository	SharePoint and T:\Technical\S&C Policies, Procedures and Guides\3 Guides\Guide to Developmental Review of New or Substantially Changed Standards and

Version History		
Version	Approved on	Change Summary
1	July 2019	
2	December 2020	Editorially Reformatted