Thank you for accepting the position of Subcommittee (SC) Chair. You’ll find the work rewarding and at times taxing, but you will have helped others gain a better perspective of how to care for, use and inspect the equipment in the B30 Volume series.

The primary responsibility of the SC Chair is to lead the SC through the following process:

A. Responding to requests for interpretation and other inquiries
B. Preparing updates and revisions to the Volume for ballot.
C. Responding to comments from ballots.

As SC Chair you will also be asked to:

D. Report on SC activities at B30 Main Committee meetings
E. Verify drafts of the Volume for ANSI public review and verify ASME galleys and proofs.
F. Recommend the addition/removal of SC members.

These responsibilities are expanded upon in the balance of this document. For any assistance or guidance about your responsibilities as a SC Chair contact the ASME B30 Staff Secretary.

A. Preparing the SC proposed responses to requests for interpretation and other inquiries on the current or past editions of the B30 Volume.

**Formal Requests for Interpretation:**

When the B30 Staff Secretary forwards a request for interpretation, the SC Chair is responsible for the following:

1) Ensure that the request is in the B30 committee’s preferred format, so that a “Yes” or “No” can be used for the response. The ASME B30 Secretary will work with the requester to get the format right.
2) Forward the request to SC members by email or in person at a SC meeting.
3) The SC should thoroughly evaluate the question and provide a “yes” or “no” response, if possible. The question can be altered to allow for a yes or no answer; however, take care not to change the intent of the request. Discussing the request with the requester is encouraged, when necessary to ensure a clear understanding of the request. The proposed response may not change, add to, or remove the requirements of the Volume. Simply answer in accordance with how the Volume is written. If a request for interpretation brings to light text, figures or tables that may need to be modified to provide clarity, put the proposed revision on the agenda for the next SC meeting. The provisions of the Volume cannot be changed in an interpretation response.
4) The proposed SC response is then forwarded to the ASME B30 Staff Secretary for inclusion in the next Main Committee meeting Agenda (Jan/May/Sept). It is very helpful if the SC Chair or an informed member of the SC is present during the Main Committee meeting when the response is being discussed and voted on.
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Note: Additional requirements for handling requests for interpretation can be found in the Procedures for ASME Codes and Standards Development Committees. SC Chairs are encouraged to review these requirements. The link to the procedures is: Procedures for ASME Codes and Standards Development Committees.

During the Main Committee meeting, the B30 committee will either approve or disapprove the SC’s response to the requestor. They may also provide some editing to the response. The SC representative needs to agree that the modified response still carries forward the intended message. If not, the Main Committee needs to understand that they have changed their response.

The Main Committee is ultimately responsible for replying to the requester. However, they lean heavily on the advice of the SC and its perspective. As SC Chair, you are the advocate for the SC and must ensure that it can live with the outcome of the response.

**Other Informal Inquiries:**
If you receive other informal inquiries you may respond to them, however, you must make it clear that your response is your own opinion and that it is not the position of the ASME B30 Committee or your SC.

**B. Preparing updates and revisions to the Volume for ballot**
The SC Chair is responsible for leading the SC and managing the work. This includes setting a schedule for revisions, arranging for teleconferences or meetings, consulting with specialists, and working with ASME B30 Staff Secretary to submit the proposed revision records for Main Committee ballot through C&S Connect. Once the ballot has closed and comments on the proposal are received, the SC is responsible for responding to comments (including any public review comments). The SC will decide what changes, if any, to make to the proposal in response to the comments. The SC Chair is responsible for moving the proposal through the approval process as shown in the Diagram on the final page of this presentation.

The need for updates or revisions to your Volume may come from a variety of sources.
- Interpretations or requests for revision
- Instructions from the Main Committee
- Machinery/equipment changes
- Changes to OSHA regulations
- Technical changes provided by ASTM, ANSI or other standards setting bodies
- SC Members

1. **Preparing proposed revisions for ballot**
   a) Proposal File Preparation (word document). Unless it is a complete rewrite, start with the original wording and note all deletions in red and struck through and all additions in blue and underlined. If revising a previously approved proposal (record) that is not included in the published version, grey highlight the previously approved text and in the rationale include the approved ballot and record number.
Whether these changes are made using tracked changes or are hard coded into the word document is up to you. There are two ways to incorporate the changes to the B30 Volume into records for ballot:

1) Consolidate the proposed revisions by chapter. Prepare a separate record for each chapter in the B30 Volume and include all changes in that record.
   i. If the changes are extensive, show the entire chapter.
   ii. If the changes are not extensive, just include the sections that are being revised within the chapter.
This is the preferred method. It is easier for members to review and for the B30 Secretary to process the revisions for public review and input to ASME editors.

2) Ballot separate paragraph and section revisions individually. Separate records are prepared for each individual revision made to the Volume. This method is often used by B30.2, B30.5, B30.9, and B30.20. With this method of balloting, cross-referencing and keeping track of overlapping revisions can get complicated. If you choose to use this method then be sure to keep track of all approved revisions in a master file.

b) Header. The proposal should contain a header at the top of a record that contains space for the ASME assigned record number, the Volume reference number and the revision date in the header as shown in the example below:

   
   Record#: 12-554  
   Standard: B30.2 – Overhead and Gantry Cranes (Top Running Bridge, Single or Multiple Girder, Top Running Trolley Hoist)  
   Subject: Chapter 0 definition and reference revisions and addition of personnel competence  
   Date: March 2012  

c) Rationale. A rationale for the proposed change is required. This is a brief explanation of why the change is being proposed or reason for the need to update or revise the Volume. Such explanations are included in the rationale section of the C&S connect record and proposal file. If the rationale is extensive, an additional background material file can be attached to the record. For ballots that include previous approved ballots not included in the published version, the rationale shall include the ballot numbers.

d) Tools. The C&S Writing and Style Guides 2010 provide information on preparing proposed revisions. When preparing a new Volume, a complete review of these guides is strongly recommended prior to preparing the Volume. The Writing and Styles Guides can be found at:

   http://www.cstools.org/WritingGuide/Cover_to_Documentation_Style_Guide.htm  

2. First Consideration Ballot to B30 Standards Committee (Main Committee)
Once a SC has developed consensus on a proposal, the approved record is submitted for first consideration ballot to the Main Committee through the B30 Staff Secretary. (After closure of the ballot, refer to Section C below for guidance on responding to comments from ballots.)

3. Preparing a Recirculation Ballot
Once the responses to comments have been approved by the Main Committee, and if it has been determined that the record needs to go for recirculation ballot, prepare the record as noted in this section.

Background:
Per 7.2.4.a of the Procedures for ASME Codes and Standards Development Committees, the only acceptable reasons for a recirculation vote are:
1) to review unresolved disapproved votes and/or substantive supervisory board comments
2) to review unresolved objections received as a result of ANSI Public Review
3) to review editorial revision(s) in response to comment(s)
4) to review technical revision(s) in response to comment(s)

During a recirculation ballot, a Main Committee member can only vote disapproved for the following reasons:
1) support of first consideration disapproved votes, unresolved Public Review objections and/or substantive supervisory board comments
2) disagreement with any changes introduced to the proposal.

As noted above, Main Committee members should only be looking at what has changed since the initial ballot and any disapprovals that were maintained. The key to preparing recirculation ballot records is to uniquely identify what has changed since the initial ballot by highlighting them.

Keep all of the marked changes noted in the initial ballot and make the additional changes that were agreed to in the response to comments. Highlight these changes in yellow to note that they are changes since the initial ballot. All deletions in red and struck through and all additions in blue and underlined: As noted in the first consideration ballot guidance above, whether these changes are denoted using tracked changes or are hard coded into the word document is up to you. For recirculation #2 or greater ballots, the SC chair shall indicate in the rational which highlighted color (other than highlighted yellow used in Recirculation #1) is being used for the proposed changes.

In the rare cases where there has been a complete rewrite, just show all existing wording in red and struck through and the complete rewrite in blue and underlined.

4. Final approval is achieved when
   a) 100% approval on first consideration
   b) 2/3 consensus approval of the Main Committee on recirculation ballots. There may be multiple recirculation ballots until consensus is achieved.

Note: All comments must be responded to before the revisions may proceed to ANSI public review and publication.
C. Responding to comments from ballots
After the Main Committee votes on the ballots, the SC Chair is responsible for coordinating the SC responses to comments received. The comments can be downloaded from the C&S Connect ballot itself or the B30 Staff Secretary can forward the comments to the SC Chair.

The Main Committee members can choose any one of the following votes on a ballot; Approved, Approved with Comment, Disapproved (with comment), Disapproved (no reason given, this vote will be disregarded and number of eligible voters is reduced by one), Abstain (not voting for any reason other than conflict of interest, usually lack of expertise) and Not Voting (chosen if there is a conflict of interest, number of eligible voters is reduced by one). Additionally, members of the Regulatory Authority Council (RAC), Interest Review Group (IRG) and the Board on Safety Codes and Standards may provide comments on balloted items.

Once the ballot results and comments are received:

1) Assess how many comments and disapprovals have been received. In some rare cases, if there are a significant number of disapprovals, the comments are extensive and/or the SC plans to undertake an extensive rewrite in response to the comments, the record can be withdrawn. In this case, the SC does not have to spend time responding to all of the comments and can start to work immediately on rewrites. Inform the B30 Staff Secretary at the next meeting that the record is withdrawn.

2) Determine how to work with the SC to develop responses to comments. In most cases, the SC chooses to deal with the comments via teleconference meetings, e-mail chains, or face to face meetings. Contact the B30 Staff Secretary to make arrangements if you want to meet via teleconference or request a meeting room during the B30 meeting week.

3) Develop responses to the comments. The SC must respond to all Comments. Examples of typical responses can be found below:

   “SC Disagrees. The SC believes that the proposed text is important because…”,

   “The SC agrees with the comment and considers the following adjustment editorial: ...The marking should be made indicated with colors to signify…”, or

   “The SC agrees and proposes to modify the balloted text as follows: ...The qualification of operators should shall be required…” This type of change is substantive and will require a recirculation ballot.

4) Obtain approval of the responses to comments from the Main Committee. Once the proposed comments are approved by the SC, you can either upload them onto C&S Connect yourself or you can forward them to the B30 Staff Secretary for inclusion in the next B30 meeting Agenda. All responses to comment are considered during B30 Main Committee meetings. If you will not be in attendance, assign a member of your SC the responsibility for handling the responses during the meeting.
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D. Submit SC Minutes to the B30 Secretary and Report on SC activity at the B30 Main Committee meetings
   1) You are expected to submit SC Minutes to the B30 Secretary. The Secretary can provide you with a template that can be used for all SC Minutes.
   2) In addition, during B30 meetings, you should be prepared to report on SC activities, if any, since the previous Main Committee meeting. If you will not be in attendance, assign a member of your SC the responsibility for reporting or send a brief report to the B30 Staff Secretary prior to the meeting.

E. Verifying ANSI public review documents and ASME galleys and proofs
   It is important that actions are published as shown in the approved version of the proposal. As SC Chair, you will have an opportunity to review the manuscript being presented to ANSI for public review and the eventual galleys and proofs developed by the ASME publishing department. You should verify that the manuscript accurately reflects the approved proposal and verify that the published version of the proposal is correct. Notify the B30 Staff Secretary of any deviations.

F. Approving SC membership
   1) Reappointments
      Membership terms expire at the end of June, regardless of the appointment month. Members of SCs are appointed for a five year term. Each year prior to the May Main Committee meeting, the SC Chairs are requested to review their members whose terms are due to expire in June of that year and indicate if they would approve their reappointment or not. Reasons for not reappointing someone usually stem from lack of participation or inability to contact the individual. The SC Chair is responsible for informing the Main Committee of their decision. Because these items are voted on during Executive Session (Main Committee members only), if you are not eligible or available to attend the Executive Session, please inform the B30 Staff Secretary, or appoint an SC member who will be attending to report for your SC.

   2) Appointments
      The B30 Staff Secretary receives applications from time to time and will forward these applications to the SC Chair for consideration for membership. The SC Chair could opt to invite the applicant to a future meeting, recommend disapprove at this time due to space limitations, lack of appropriate expertise, etc. or recommend approval of the applicant. The SC Chair is responsible for keeping the applicant informed of upcoming meetings and the B30 Staff Secretary will also copy them on upcoming meeting announcements. Similar to reappointments, the SC Chair is responsible for informing the Main Committee of their decision on whether or not to appoint someone to the SC. These items are voted on during Executive Session, so if you are not eligible or available to attend Executive Session, please inform the B30 Staff Secretary, or appoint an SC member who will be attending to report for your SC.
Diagram 1 - Proposed Revision Approval Process