



New Officer Handbook

Your Responsibilities as a NACE International Technical Committee Officer



Congratulations! You have been chosen as an officer of a NACE International technical committee.

Technical Committee officers must exercise leadership to fulfill the responsibilities of their office and their Task Group and/or Technology Exchange Group.

As an officer, you are the human factor that will determine whether your group's activities will be successful, or whether your group will be no more than a list of names.

This handbook is intended to provide guidance on your responsibilities and acquaint you with the resources available to help you do your job. Please read it, ask questions, use the resources, put your talents to use, and enjoy the contacts you make in this leadership role.

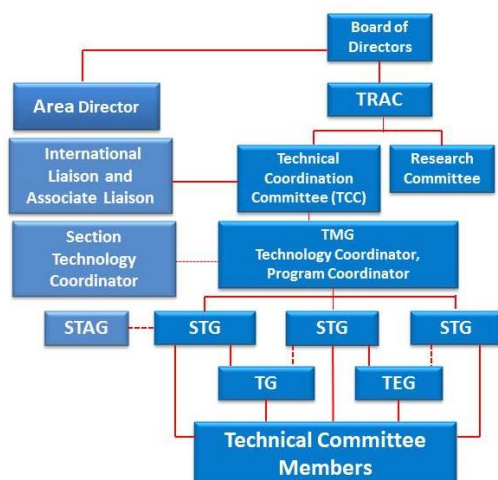
These Things Are Important. . .

- **PLANNING**—*set realistic goals and strive to meet them.*
 - Think carefully about your time and resources and those of your committee members.
 - Reminders to those assigned tasks may be in order!
- **COMMUNICATION** (*up, down, and all around*)
 - Let others know what you expect.
 - Ask for the input of others. You may be surprised by the expertise around you!
- **LEAD MEETINGS**
 - Refer to guidelines on parliamentary procedures for help in this area (booklet available from Headquarters).
 - A quorum is not needed to conduct task group business.
 - Others need a chance to present their viewpoints, but...
 - You are in control of your meeting.
- **RECORD KEEPING, INCLUDING MINUTES/AGENDAS**
 - See instructions on writing and submitting minutes and agendas in the *Technical Coordination Committee and Technical Committees Operating Manual*.
 - Sample minutes and agenda forms are available from the NACE Web site. Remember, without minutes a meeting never took place.
- **KNOW THE PROCEDURES**
 - *Technical Coordination Committee and Technical Committees Operating Manual (TCOM)*—Become familiar with it! It is available from Headquarters or from the NACE Web site at www.nace.org. It includes detailed information about the structure and operation of the technical committees.
 - *Technical Committee Publications Manual (TCPM)* (available from Headquarters or from the NACE Web site)—provides guidelines and balloting procedures if your group is writing a standard or technical committee report.
- **BE PROFESSIONAL AND UNBIASED**
 - Don't let commercial or competitive considerations enter in—remember, NACE has members from many different companies who are all interested in the common goal of corrosion control.
 - Don't let your emotions control your actions.
- **BE CHOOSY**—*choose task group members based on their ability to contribute*
 - While it's nice to let anyone who visits a meeting join your task group, consider whether the person has the time and commitment to really assist in achieving the task group's goals. There is no advantage in having a large roster of noncontributing members.
 - Some of the most effective task groups at NACE are very small!

Technical Committee Structure and Operation

- NACE has 350 (±) technical committees. More than 3,000 NACE members participate in technical committee activities.
- The committees are led by the **Technical Coordination Committee (TCC)**, which serves as the administrative and policy-making body to the committees.
- **Technology Management Groups (TMGs)** provide a structure and a conduit for communication between the TCC and the **Specific Technology Groups (STGs)**. They provide assistance, when necessary, to help STGs achieve their objectives. Each TMG has:
 - One **Technology Coordinator** responsible for facilitating formation of new committees, coordinating, ratifying procedures, and communicating among committees.
 - One **Program Coordinator** responsible for symposia and helping plan Technical Information Exchanges.
- STGs are assigned specific technical areas within TMGs:
 - Industry-Specific Technology (N)
 - **N1:** Corrosion Prevention and Control for Oil and Gas Production, Petroleum Refining, and Gas Processing Industries
 - **N2:** Corrosion Prevention and Control for Chemical Process and Energy, Pollution Control, Air and Sea Transportation, and Military Industries
 - Cross-Industry Technology (C)
 - **C1:** Corrosion Prevention and Control for Concrete, Land Transportation, and Coating Technology
 - **C2:** Corrosion Prevention and Control for Pipelines and Tanks, Industrial Water Treating and Building Systems, and Cathodic Protection Technology
 - Science (S)
 - **S:** Corrosion Science and Technology
- STGs sponsor Task Groups (TGs) and Technology Exchange Groups (TEGs).
 - **Task Groups (TGs)** complete specific assignments such as the preparation of technical committee reports, standards, and other technical committee publications.
 - **Work Groups (WGs)** can be formed under TGs to accomplish portions of the Task Group project.
 - **Technology Exchange Groups (TEGs)** organize and direct symposia and technical information exchanges (TIEs).
 - Each TG or TEG has one Administrative STG, and many TGs or TEGs have several other sponsoring STGs.
- **Section Technology Advisory Group (STAG)** refers to a technical committee formed by International Sections outside North America to locally address the technical needs of their Section membership. Such activities of the STAG may include organizing technical information exchanges, revising or developing NACE standards that address the local International Section or Area needs, promoting new technology areas that do not currently exist within TCC, or other technical initiatives. Any NACE member from anywhere may be a member of a STAG.
- More information on the structure and operation of the TCC is contained in the *TCOM*, available from NACE Headquarters and on the NACE Web site.

TCC Structure



Legend:

TG = Task Groups (228)
TEG = Technology Exchange Groups (112)
STG = Specific Technology Groups (27)
STAG = Section Technology Advisory Group
TMG = Technology Management Groups (5)
TCC = Technical Coordination Committee
TRAC = Technical and Research Activities Committee

Task Groups (TGs)

- TGs are small committees formed by one or more STGs to produce specific documents as assigned.
- The work of each TG generally culminates in a technical committee publication.
- TGs do not sponsor symposia or TIEs, as this is the domain of TEGs. In exceptional cases, the STG chair, in consultation with the Program Coordinator, may approve of TGs sponsoring a TIE when it would have a direct impact on their document under development.

Formation of a TG

- Formation of TGs is proposed by STG members, approved by the STG Steering Committee, and accepted by the Technology Coordinator.
- Proposals for new TGs include a proposed title, assignment, justification, timeline, and officers, and are distributed to the Technology Coordinator, TCC vice chair, and STG Steering Committee on the form **TG-1**.
- Proposals for new TGs may be approved by the STG Steering Committee in a scheduled meeting or through letter ballot. A majority affirmative vote of the Steering Committee is required for formation of a new TG.

TG Officers

- Officers for each TG are appointed by the chair(s) of the sponsoring STGs.
- Officers are selected on the basis of professional knowledge, experience relative to the assignment, and organizational ability.
- TG officers include a chair and at least one other officer (vice chair or secretary) who is responsible for the minutes. There are a maximum of three officers on a TG.

TG Membership

- Membership of TGs consists of the following:
 - Chair
 - Vice chair
 - TG members are members of the administrative STG and Association members in good standing.
- Initially, following the formation of a TG, members are appointed cooperatively between the sponsoring STG chair(s) and the TG chair. Thereafter, members are appointed only by the TG chair.
- Membership should be limited to as small a number (approximately 10) as is reasonable to conduct the assignment effectively.

TG Meetings

- TG chairs are responsible for holding as many meetings as necessary to meet the TG's goal; a quorum is not required to conduct task group business.
- TGs are encouraged to meet at Corrosion Technology Week (CTW), the annual work week for the technical committees (usually held in September).
- All TG meetings are open; meetings held at times and locations other than CTW and annual conference must have been adequately announced to all interested parties in advance to permit attendance.
- TGs may convene by teleconference or Web meeting. NACE Headquarters can assist with setting up conference calls and hosting Web meetings for TGs.
- The TG chair is responsible for assuring there is an agenda for each meeting, minutes are taken at each meeting, and that agendas and minutes are submitted to Headquarters within 4 weeks thereafter.
- After the initial meeting of the TG, much of your TG assignment can be accomplished by correspondence, including e-mail. NACE Headquarters can assist in distributions of correspondence or draft documents to your members.

TG Work Groups (WGs)

- WGs may be formed by the TG chair to accomplish specific parts of the TG's assignment.
- WGs are designated by adding a sequential lower-case letter to the TG designation, e.g., 000a.
- WG chairs and members are appointed by the TG chair and must be members of the sponsoring TG and association members.

Technology Exchange Groups (TEGs)

- Provide forums for sponsorship of a symposium and/or technical information exchanges (TIEs).
- Sometimes used to explore the need for development of a document before deciding on the formation of a Task Group (TG). (If the results of the TEG assignment indicate the need for a technical committee publication, a TG is formed.)
- TEGs do not generate technical committee publications—this is expressly the domain of task groups.

Formation of a TEG

- Formation of TEGs is the responsibility of the STG Steering Committee in consultation with the Program Coordinator.
- Proposals for new TEGs include a proposed title, assigned technology areas, and officers, and are distributed to the STG Steering Committee on form **TEG-1** as part of an agenda for a scheduled Steering Committee meeting.
- Proposals for new TEGs may be approved by the STG Steering Committee in a scheduled meeting or through letter ballot. A majority affirmative vote of the Steering Committee is required for formation of a new TEG.

TEG Officers

- Officers for each TEG are appointed by the chair(s) of the sponsoring STGs.
- Terms begin upon approval of the TEG formation.
- Officers are selected on the basis of professional knowledge, experience relative to the assignment, and organizational ability.

TEG Membership

- Membership of TEGs consists of the following:
 - Chair
 - Vice chair
 - Any member in good standing of the Association who has an interest in participating in the TEG.

TEG Meetings

- The primary purpose of TEGs is to sponsor formal paper presentations (symposia at the Annual Conference and area meetings), or technical information exchanges at meetings of the TEG. The format (or the type) of these presentations may be established by the TEG in conjunction with the sponsoring STG(s).
- TEGs may have a short (one hour or less) business meeting as required to plan future TIEs or symposia. The business session may be held at the end of a regularly scheduled TIE.
- No minutes are required for TEG meetings, but a written report identifying the subject of any TIEs, issues that were raised, future plans for the TEG, and recommendations to the STG must be submitted to the sponsoring STG Steering Committee(s) within 4 weeks of the TEG meeting.

Parliamentary Procedures

Before Your Meeting. . .

- Be familiar with:
 - Basic Parliamentary Procedures (see “The A-B-Cs of Parliamentary Procedure,” available from NACE Headquarters).
 - Technical Coordination Committee and Technical Committees Operating Manual (TCOM)
 - Technical Committee Publications Manual (TCPM)
- Plan the meeting
 - Set a realistic agenda
 - Anticipate leadership needs and controversies

During Your Meeting . . .

- Maintain order, flexibility, and personal neutrality
- Listen!
- Keep discussion focused
- Protect the rights of the majority, the minority, and the individual
- Assure a fair hearing
- Withstand procedural challenges
- Comply with the Bylaws; no quorum is required to conduct task group business.
- If you must speak on a motion, yield the chair to the next officer, and step away from the rostrum.

Meeting Agenda

- Call to Order
- Minutes
- Officer Reports
- Committee Reports
- Liaison Reports
- Special Orders
- Old Business
- New Business
- Announcements
- Adjournment

Written Resources for Achieving Committee Goals

These resources are available on the NACE Web site, www.nace.org, under the “Committees” tab.

Technical Committees Directory

Provides titles, designations, officers, and scopes of the technical committees, as well as rosters for the TCC, STGs, TGs, TEGs, and WGs.

Technical Committee Minutes and Agendas

Give information about what has happened and what is planned in technical committee meetings; you are responsible for submitting yours to Headquarters for distribution.

Technical Coordination Committee and Technical Committees Operating Manual (TCOM)

Provides information on the structure and operation of the TCC and technical committees.

Technical Committee Publications Manual (TCPM)

Outlines the development process for standards and technical committee reports.

NACE International Publications Style Manual

Provides style guidelines to be followed for all NACE publications, and includes a special section for technical committee publications.

Symposium Technical Program Manual for Symposium Chairs, Vice Chairs, Reviewers, and Authors

Provides requirements and deadlines for symposia at Annual Conference.

Annual Conference Program Committee (ACPC) Operating Manual

Provides information on the structure and operation of the ACPC and symposia.

People Who Can Provide Assistance with Achieving Committee Goals

TCC Officers

- The TCC chair is responsible for the functioning of the TCC. The TCC chair is a member of the Technical and Research Activities Committee (TRAC) and attends all meetings of the TRAC.
- The vice chair is knowledgeable about the TCC's activities and can assume the duties of the chair when necessary. The vice chair is also a member of the TRAC and attends all meetings of the TRAC.
- The vice chair is also a voting member of the ACPC.

Technology Coordinators

- Verify the need for and facilitate the formation of new TGs and ensure there is no duplication of assignments among TGs.
- Coordinate with other Technology Coordinators to improve communication and cooperation among the STGs, and actively promote joint TGs.
- Certify that procedures were followed in the approval of technical committee publications.
- Serve as a coordinator/communicator between the STG chairs and the TCC.

Associate Technology Coordinators

- Responsible for attending TCC meetings and assisting the Technology Coordinator with the Technology Coordinator functions.
- Vote at TCC meetings in the absence of the Technology Coordinator.

Program Coordinators

- Responsible for symposia sponsored by STGs. Serve on ACPC and coordinate activities of the technical symposia under their Technology Management Group.
- Coordinate with TEGs to promote and produce technical information exchanges (TIEs).
- In the absence of the Technology Coordinator, serve as the chair of the Technology Management Group.

Associate Program Coordinators

- Responsible for attending ACPC meetings and assisting the Program Coordinator.

STG Officers

- The chair keeps the vice chair informed of all activities, presides over meetings, and arranges meeting times, dates, and locations in cooperation with Headquarters.
- The chair appoints officers of TGs and TEGs administered by the STG.
- The vice chair is responsible for securing awards nominations from the STG, its TGs, and its TEGs.
- The vice chair assists the Program Coordinator and symposium chairs to resolve issues related to the content, quality, and organization of symposia.
- In the absence of the chair, the vice chair assumes the responsibilities of the chair.
- STG officers are responsible for recruiting members and encouraging active participation in the STG.

Mentors

- Mentors are current or former technical committee officers who have "been there, done that," and they will be happy to share their knowledge and experience with you.
- Contact a Technical Activities staff member or a TCC officer if you would like a Mentor.

Advisory Committee on Operations

- Provides advice, guidance, and consultation to the TCC and technical committee officers in the area of committee operations.
- Maintains the *Technical Coordination Committee and Technical Committees Operating Manual* and *Technical Committee Publications Manual*.
- Provides assistance in training committee officers.








Reference Publications Committee (RPC)

- Review all proposed NACE standards, technical committee reports, and special publications for compliance with the *NACE International Publications Style Manual* prior to approval by STG chairs, Technology Coordinators, and the TCC chair.
- Documents reviewed by three RPC reviewers; RPC chair consolidates comments into one RPC response.
- TG chair provided copy of RPC comments. If TG disagrees with RPC comments, they can discuss this with RPC to come to a mutual understanding and agreement on document structure.
- NACE staff editor incorporates RPC comments.

More Assistance Contacts on p. 7

NACE Headquarters Contacts

NACE Headquarters in Houston provides administrative support to the technical committees, plans conferences and meetings, and publishes standards, books, and reports written by the technical committees. Feel free to call us any time you have a question or concern.

	Staff Contact	Contact Information	Responsibilities
	Linda Goldberg Director, Technical Activities	Phone: +1 281-228-6221 E-mail: linda.goldberg@nace.org	Staff liaison to TRAC, TCC, and the Research Committee. Responsible for all technical committee publications and technical and research symposia.
	Everett Bradshaw Manager, Technical Activities	Phone: +1 281-228-6203 E-mail: everett.bradshaw@nace.org	Provides editorial and administrative support to technical committees in the development of standards, reports, and other technical committee publications. Staff liaison to the Planning and Operations Committees.
	Edward Barrett Strategic Standards Developer, Technical Activities	Phone: +1 281-228-6295 E-mail: edward.barrett@nace.org	Helps to advance NACE's objectives with the International Organization for Standardization (ISO); provides organizational support to technical committees in the development of standards. Liaison to the Maintenance Panel for NACE MR0175/ISO 15156. Administers ANSI-Accredited U.S. TAGs to ISO, and serves as Secretary for ISO/TC 67/SC 4.
	Rick Southard Senior Editor, Technical Activities	Phone: +1 281-228-6485 E-mail: rick.southard@nace.org	Provides editorial and liaison support to the technical committees in the development, publication, and marketing of standards, reports, and other technical committee publications. Staff liaison to the TCC Reference Publications Committee.
	Trudy Schreiner Standards Editor/Liaison, Technical Activities	Phone: +1 281-228-6208 E-mail: trudy.schreiner@nace.org	Provides editorial and liaison support to the technical committees in the development, publication, and marketing of standards, reports, and other technical committee publications. Edits the TCC e-Newsletter, distributed to TCC members quarterly.
	TBA Committee Coordinator Technical Activities	Phone: E-mail:	Maintains technical committee rosters and officer assignments. Prepares and distributes meeting minutes, agendas, and other correspondence. Sets up and closes out ballots and committee surveys.
	TBA Symposium Manager Technical Activities	Phone: E-mail:	Manages the symposia and Paper Trail system and works extensively with symposium officers, authors, and reviewers. Staff liaison to the ACPC.
	Calae McDermott Manager, Conferences	Phone: +1 281-228-6263 E-mail: calae.mcdermott@nace.org	Plans topical conferences and the NACE annual conference.
	Lesley Martinez Associate, Conferences	Phone: +1 281-228-6242 E-mail: lesley.martinez@nace.org	Plans and schedules meetings for CTW.
	FirstService Department	Phone: +1 281-228-6223 E-mail: firstservice@nace.org	Processes orders and subscriptions. Registers members for classes, conferences, and meetings. Maintains the membership database.

Writing NACE Standards and Technical Committee Reports

- You may need to discuss with your administrative STG chair the process for accumulating necessary information for writing the report or standard.
- You and your administrative STG chair may decide that inadequate information is available and additional data and information must be obtained by means of surveys, questionnaires, or other methods of collecting valid information and data that can be used as the basis for a report or standard. Any such surveys should always be distributed by Headquarters and the responses returned to Headquarters.
- You may also decide that because of a lack of information, round robin tests will be necessary. In this event, the approach and procedures to be followed by the task group in conducting such tests must be outlined in detail.
- If you and your task group members do not have copies of the *Technical Committee Publications Manual* and the *Publications Style Manual*, request copies from NACE Headquarters or download from the Web site.
- When in doubt as to whatever is necessary for the completion of your assignment, always feel free to consult with the chair of your administrative STG. He or she will be able to help you in many ways.

NACE Standards

NACE is a standards developing organization accredited by ANSI. There are three categories of NACE standards:

Standard Practices (SPs) shall be methods of selection, design, installation, or operation of a material or system when corrosion is a factor. This class of standard may provide details of construction of a corrosion-control system; methods of treating the surface of materials to reduce requirements for using corrosion-control devices; criteria for the proper operation and maintenance of a corrosion-control system; methods for the proper use of corrosion-control techniques; procedures for increasing the effectiveness, safety, and economic benefits of an installation or system; procedures for proper use of an installed corrosion-control system to prevent its deterioration; or other practices requiring a description of techniques or control parameters for a system.

Standard Test Methods (TMs) shall be tests related to corrosion prevention and control. This type of standard can give the method of conducting tests of any type to ascertain the characteristics of a material, design, or operation. TMs shall not include acceptance or performance criteria. These criteria may be covered in standard material requirements or standard practices.

Standard Material Requirements (MRs) shall be standards that define the necessary characteristics of a material when corrosion is a factor in the selection, application, and maintenance of the material. This type of standard may include chemical composition of the material, its mechanical properties, its physical properties, material selection, and other aspects of its manufacture and application.

Technical Committee Reports

Subjects for technical committee reports fall into two broad categories:

- Informational reports that can be statements on a specific problem (summarizing its ramifications, controversial points, and possible solutions), surveys of common practices, bibliographies on special subjects, etc.; and
- State-of-the-art reports, which deal with the current science and technology of a method, technique, material, device, system, or other aspect of corrosion-control work.

All reports should be based on information and data obtained through cooperative tests, questionnaires or surveys, studies of past experience, analyses, literature surveys, and other means by which useful technical information and data can be obtained.

All reports must reflect the best collective thinking possible on a given subject and must be an authoritative statement on the topic which will be a credit to the Association. No report is to be based exclusively on the data accumulated by one person or one company, and all reports must be consistent with the Association's Antitrust Policy.

Checklist for NACE Standards

CHECKLIST FOR NACE STANDARDS

(Paragraph numbers refer to the *NACE Publications Style Manual*.)

THREE types of standards (these guidelines apply to all three types of NACE standards):

- Standard Practice (SP)
- Test Method (TM)
- Material Requirement (MR) (Paragraph 3.2.1)

- “Shall”** or **“must”** = says the statement is mandatory
- “Should”** = says the statement is recommended but not mandatory
- “May”** = says the statement is optional advice (Paragraph 3.4.3.2.1)

Wording such as “it is recommended,” “it is preferred,” “it is required,” and the words *can* and *is* should be avoided.

- SI first!**
 - Followed by U.S. customary units in parentheses (optional)
 - Correct number of significant digits? (Paragraph 2.15.2 and Appendix L)

- Materials designations**
 - UNS number in parentheses after common metal or alloy name on first reference
 - UNS number alone in subsequent references
 - NO TRADE NAMES! (except in bibliographic citations and footnotes) (Paragraph 3.4.3.7)

- The **Foreword** contains:
 - Purpose (why this is being written)
 - Intended audience (who should benefit)
 - Explanatory information
 - Sponsoring committees (Paragraph 3.4.3.2)

- The body of the standard **MUST** begin with **“Section 1: General”**
 - Scope
 - Limitations of standard
 - Brief description of topics covered (Paragraph 3.4.3.3)

- General organization of standard**
 - Clear
 - Fits with purpose as stated in Foreword
 - Logical flow
 - If test method, make sure all procedure steps are included and can be followed by reader (not just an expert)

- Terminology and wording used in standard**
 - Definitions of terms used in standard must agree with definitions in NACE/ASTM G193
 - Once defined, all terminology must be used consistently throughout the standard
 - All wording should be easily understandable and reader-friendly (not written for expert only)
 - Avoid redundancy; say it correctly once, and don't repeat

- Numbering**
 - (Logically) numbered paragraphs (Paragraph 3.4.3.3)
 - Equations **MUST** be numbered (Paragraph 2.7)

- Tables, figures, and appendixes**
 - Must have titles
 - Must be mentioned in the text
 - Must be numbered in order of appearance in the text (Paragraphs 2.3, 2.9.3, and 2.9.4)

- References/footnotes/bibliographic entries**
 - Use a footnote to give complete address of societies and government organizations mentioned in the report.
 - Use a footnote to give additional information related to something in the text that needs explanation but does not belong in the main text.
 - Use a reference to give facts of publication for every document mentioned or quoted in the report.
 - Refer to the most recent edition.
 - Use a reference section—not footnotes—to give facts of publication.
 - Use a bibliography to list documents used in preparation of the report.
 - Include volume numbers, page numbers, titles, and authors for journal articles.
 - Include the publisher and the city and state (country) of publication for all except journal articles. (Paragraphs 2.4, 2.8, and 2.12)

- Do the contents match the scope given in the Foreword or Section 1 (Paragraph 3.4.3.3.1)?

Checklist for NACE Technical Committee Reports

CHECKLIST FOR NACE TECHNICAL COMMITTEE REPORTS

(Paragraph numbers refer to the *Publications Style Manual*.)

- TWO** types of reports (these guidelines apply to both types of reports):
 - State-of-the-art
 - Informational
 - NOT a guideline document. (Paragraphs 3.5.3.2 and 3.5.3.2.1)

- NO RECOMMENDATIONS!**

The words "shall," "must," and "should" **SHALL NOT** be used to indicate requirements or recommendations, which are not allowed in reports. (Paragraph 3.5.3.6)

- Give actual unit measured first**
 - If actual unit is U.S. customary, SI unit must follow in parentheses.
 - If actual unit is SI, U.S. customary unit may follow in parentheses.
 - Correct number of significant digits? (Paragraph 2.15 and Appendix L)

- Materials designations**
 - UNS number in parentheses after common metal or alloy name on first reference
 - UNS number alone in subsequent references
 - NO TRADE NAMES! (except in bibliographic citations or footnotes) (Paragraph 3.5.3.7)

- The **Foreword** contains:
 - Purpose (why this is being written)
 - Intended audience (who should benefit)
 - Explanatory information
 - Sponsoring committees (Paragraph 3.5.3.2)

- Narrative** paragraphs (not numbered) (Paragraph 3.5.3.3)

- Equations **MUST** be numbered (Paragraph 2.7)

- Tables, figures, and appendixes**
 - Must have titles
 - Must be mentioned in the text
 - Must be numbered in order of appearance in the text (Paragraphs 2.3, 2.9.3, and 2.9.4)

- References/footnotes/bibliographic entries**
 - Use a footnote to give complete address of societies and government organizations mentioned in the report.
 - Use a footnote to give additional information related to something in the text that needs explanation but does not belong in the main text.
 - Use a reference to give facts of publication for every document mentioned or quoted in the report.
 - Refer to the most recent edition.
 - Use a reference section—not footnotes—to give facts of publication.
 - Use a bibliography to list documents used in preparation of the report.
 - Include volume numbers, page numbers, titles, and authors for journal articles.
 - Include the publisher and the city and state (country) of publication for all except journal articles. (Paragraphs 2.4, 2.8, and 2.12)

- Do the contents match the **scope** given in the Foreword (Paragraph 3.5.3.2)?