



STANDARD OPERATING PROCEDURE

Maintenance and Approval of ICAR Guidelines

Doc number	03_COM_0005
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PURPOSE

To describe the procedure to be followed for the maintenance of the published ICAR guidelines.

As per ICAR Statutes Article 3, ICAR Guidelines shall be approved by the ICAR Members. ICAR Standard Operating Procedure (SOP) 03_COM_0005 describes the full approval process from creation to publication

The annex 03_COM_0005_A2 referenced herein is a supporting document to ICAR SOP 03_COM_0005.

Any changes or amendments to this procedure requires prior approval by the ICAR Board.

SCOPE

This procedure covers the initiation through to the implementation of a change to the ICAR Guidelines as outlined in figure 1 below. The main elements of this procedure are:

1. Scope of Review

A decision is made to add or amend a part to the ICAR Guidelines. This decision defines the scope of the amendment to be undertaken. The scope can be as broad as adding an entirely new Section or as narrow as amending a paragraph with a Section.

2. Draft Guideline

A team of experts prepares a draft of the amended Guideline. This drafting process likely involves a series of iterations until the experts are in agreement.

3. Edit Guideline

The drafting process (step 2) is conducted under the guidance of the person appointed by the ICAR Chief Executive to maintain the standards for the final publication of the ICAR Guidelines. Once the editor and the expert group are in agreement the change is recommended for decision.

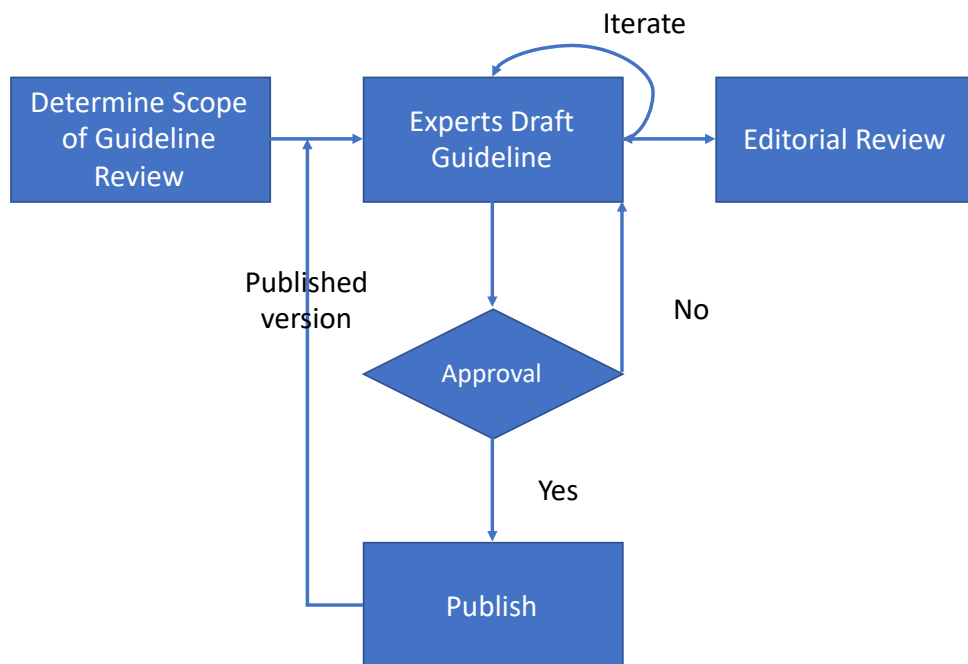
4. Decision to Publish

The decision to adopt a Guideline change ultimately rests with the ICAR Members at the General Assembly (as per Article 3 of ICAR statutes). The decision process is under the control of the ICAR Board. See Annex 03_COM_0005_A2_Members Approval of Guidelines.

5. Publication

The final step in the process is publication of the amended Guideline on the ICAR Website.

Figure 1. Scope of ICAR Guideline maintenance procedure.





TERMS & DEFINITIONS

Table 1. Definitions of Terms used in this procedure.

Term	Definition
Animal recording	This is a generic term to describe the scope of ICAR's activities. Animal recording includes animal identification, records of all aspects of animal reproduction, parentage determination, measurement of any aspect of the animal, the products it produces, its ownership, its location, its fate and the uses to which the resulting data is put. Including for genetic evaluation, for farm management, for quality assurance, for disease control and for animal welfare.
API	An application-programming interface (API) is a set of subroutine definitions, protocols, and tools for building application software. In general terms, it's a set of clearly defined methods of communication between various software components. A good API makes it easier to develop a computer program by providing all the building blocks, which are then put together by the programmer.
Appendix	A computer file in the guidelines database which provides detailed reference material relevant to a specific topic in the database.
Associate Member	An organization providing goods and/or services to ICAR full members who has been granted associated membership of ICAR.
Best Practice	A method or technique that has been generally accepted as superior to any alternatives because it produces results that are superior to those achieved by other means or because it has become a standard way of doing things ¹
Editor	A position within the ICAR Secretariat that is responsible for carrying out the editorial functions associated with the ICAR guidelines system.
Full Member	An organization providing animal recording services to farmers who has been granted membership of ICAR.
Non-Member	Any organization of individual with an interest in animal recording who is not a member of ICAR.
Overview	A description of a section of the guidelines database which provides context for the guidelines and appendices contained therein.
Procedure	A detailed description of best practice and relevant parameters including limits, in an aspect of animal recording.
Section	A part of the guidelines database which covers one aspect of animal recording. Each section contains an overview, one or more guidelines and associated appendices.
Standard	Same as guideline.

¹ https://en.wikipedia.org/wiki/Best_practice



RESPONSIBILITIES

Position	Responsibilities
Chief Executive	Approve scope of review. Appoint expert team. Oversee decision to publish.
Groups Coordinator	Draft scope document. Identify Group and expert resources for expert team.
Information Executive	Support tools used for drafting (templates, websites, software, backups, etc.). Facilitate publication.
Editor	Ensure draft complies with ICAR standards.
Group Chair	Ensure relevant expertise is identified and selected for expert team. Support expert team.
Expert	Provide expert advice on the current state-of-the-art for best practice in the field of the review.

PROCEDURE

1. Determine Scope of Guideline Review

Step	Description (what)	Who
a.	Initiate review	Chief Executive in consultation with Groups Coordinator, Chair of Group, ICAR Board.
b.	Prepare Scope	Groups Coordinator in consultation with Chair(s), and Chief Executive.
c.	Approve Scope	Chief Executive in consultation with ICAR Board – requires Board Approval.
d.	Appoint Experts	Chief Executive in consultation with Chair and Groups Coordinator.

2. Experts Draft Guideline

Step	Description (what)	Who
a.	First meeting of Experts – review scope and briefing on tools. Become familiar with the user instruction manual – copy here .	Groups Coordinator, Chair of Group, Experts, Information Executive, Editor.
b.	Prepare first draft by taking the MS Word version of the current guideline, if one exists, and marking it up with all proposed changes. If no guidelines exist then the (available here)	Experts.



	standard template for ICAR Guidelines is to be used as a starting point.	
c.	Discuss next draft – and repeat till reach agreement.	Experts.
d.	Forward final draft to Editor for review.	Experts and Editor.

A detailed user manual for drafting ICAR guidelines is available [here](#).

3. Editorial Review

Step	Description (what)	Who
a.	Consult with Editor. Editor ensures Guidelines' template is applied. Editor ensures integration with existing guidelines.	Editor with Experts.
b.	Agree final draft for approval.	Editor
c.	Forward final draft to Groups Coordinator	Editor and Groups Coordinator

4. Final

Step	Description (what)	Who
a.	Consult with Chief Executive.	Groups Coordinator with Chief Executive.
b.	Forward final draft to Board for Approval. Deal with concerns and suggestions raised by Board. Consult with Group chair on significant changes.	Chief Executive.
c.	Forward to Members/General Assembly Annex 03_COM_0005_A2_Members Approval of Guidelines	Information Executive
d.	Review feedback.	Experts, Editor, Groups Coordinator.
e.	Send for further drafting or proceed to publish.	Chief Executive and Groups Coordinator.



5. Publication

Step	Description (what)	Who
a.	Add English ² version to ICAR Website.	Information Executive

REFERENCE DOCUMENTS

1. Annex 03_COM_0005_A2_Members Approval of Guidelines
2. **File Naming Conventions**

a. Procedures File Naming:

ss - Procedure nn - short name vyy.zz.docx - where:

- ss is 2 digit section number,
- nn is procedure number with section,
- short name as found in the footer of the procedure and when used to describe it in other documents
- yy is last two digits of year in which this version was created,
- zz is a two-digit version number within year, starting and 1 and incrementing by 1 for each version.

Example from Section 2:

02 - Procedure 1 - 24-hour yield v17.04.docx

b. Appendix File Naming:

ss - Appendix nn - short name vyy.zz.wwww - where:

- ss is 2 digit section number,
- nn is appendix number with section,
- short name as found in the footer of the appendix or when used to describe it in other documents
- yy is last two digits of year in which this version was created
- zz is a two digit version number within year, starting and 1 and incrementing by 1 for each version
- wwwww is file extension for type of file. Eg docx, pptx, xlsx, pdf etc.

² At a future date we need to give consideration to facilitating and supporting official translations into the languages used by ICAR Members.



3. Template for Guidelines

The standard template for ICAR Guidelines is [here](#).
Instructions for writing ICAR Guidelines is [here](#).