



Full Working Group Day

Krakow, 15 October 2025



SubCom Working Groups Co-chairs

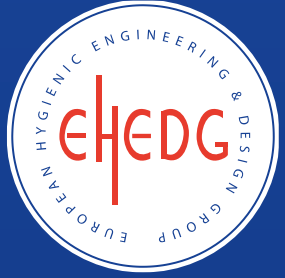


Patrick Wouters - EHEDG



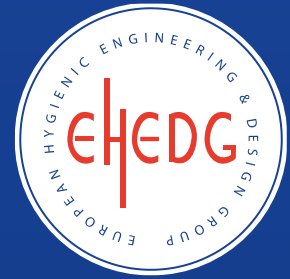
Uwe Heisswolf - Kieselmann

Our SubCom Working Groups Guide



- Vanessa Amani

Agenda FWGD Krakow (15 Oct)



- 
- | | | |
|----|------------------------------|--|
| 01 | 08:30 Start - Introduction | |
| 02 | 09:30 Group Session 1 | |
| 03 | 10:00 Coffee | |
| 04 | 10:15 Group Session 2 | |
| 05 | 12:30 Lunch | |
| 06 | 13:30 Group Session 3 | |
| 07 | 14:30 Coffee | |
| 08 | 14:45 Feedback Presentations | |
| 09 | 17:15 Closure | |
| 10 | 17:30 End | |

Note: Use your social time to catch up / network with your related WGs!!



Vision & Mission



Our vision

- The aspirational goal that drives our foundation is to be the leading source of hygienic design and engineering expertise and enhance food safety and quality across the whole industry. This is the shared ambition that shapes our role in the outside world.

Our mission

- The outline around our logo captures the mission we're relentlessly committed to raise awareness of hygienic design and engineering, develop guidance and solutions, provide a platform to promote our expertise and facilitate networking across the world.



Constitution, Internal Rules & Code of Conduct



- Why do we have a Code?
- Who must follow our Code?
- What does the Code require from me?
- What should I do if I learn about or suspect misconduct?
- What will happen if someone does not follow the Code?

1. We follow the law

- Following Applicable Laws

2. We conduct our activities with integrity

- Anti-Bribery
- Gifts and Entertainment
- Fair Competition
- Intellectual Property



Constitution, Internal Rules & Code of Conduct



3. We keep accurate and transparent records

4. We honour our organisational obligations

- Trust in Relationships

5. We treat people with dignity and respect

- Human Rights
- Strength through Diversity
- Alcohol and Drugs
- Harassment and Violence

6. We protect EHEDG's information, assets and interests

- EHEDG Property and Resources
- Political Activity



02.| Introduction

Objectives of FWGD



Align on the OGSM

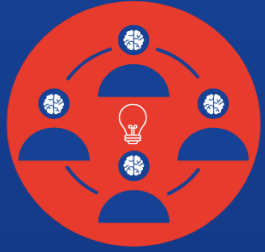
Create awareness and alignment amongst the working groups

Agree on working procedures

Define future activities / annual plan 2026



What were our EHEDG goals for 2025



1. Strengthen membership engagement



2. Enhance membership benefits and product portfolio



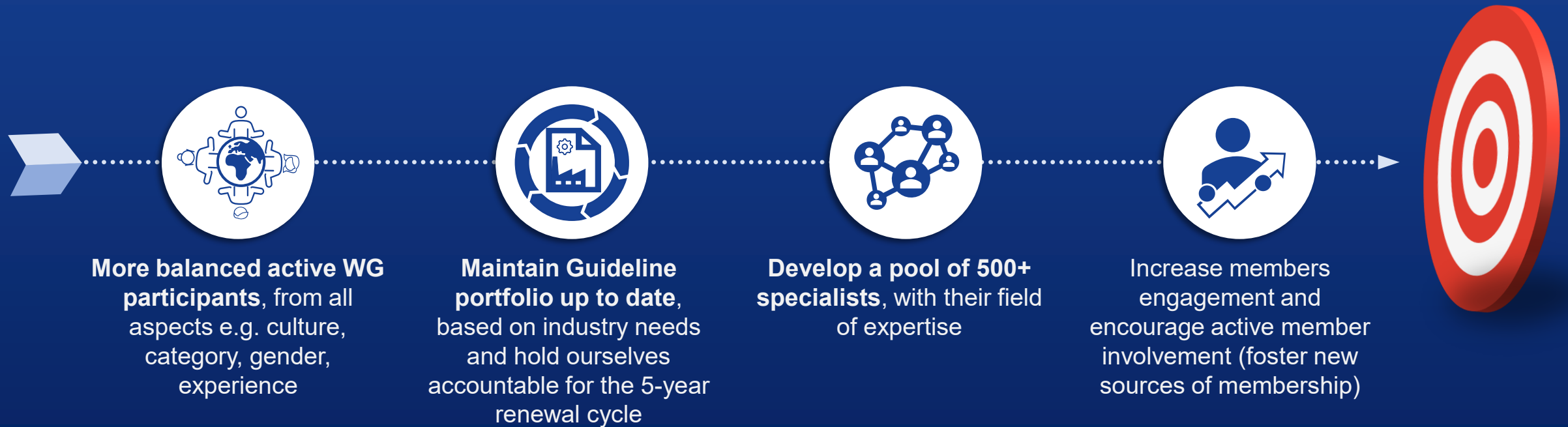
3. Establish strategic partnerships for effective market positioning



4. Expand our global footprint



OGSM / strategic goals for SubCom Working Groups



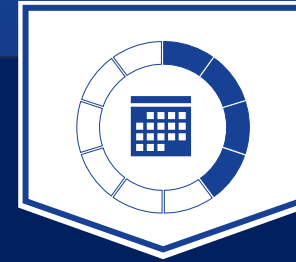
OGSM Goal 1



Working Group Overview

2025

Number of WGs	33
Total number of active WG members	352
Male Members	304
Female Members	48
Number of Corresponding Members	33
Peer Reviewers	19
Total Peer Reviews	39 of 8 guidelines
Members Born Before 1989	344
Members Born After 1989	8

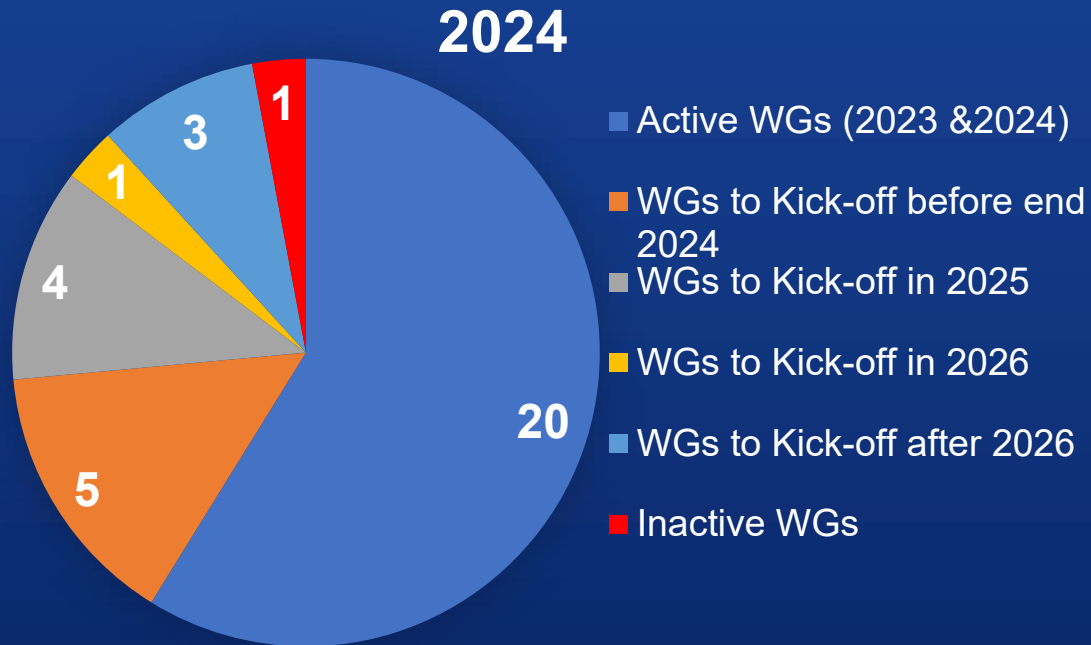


Status 2025

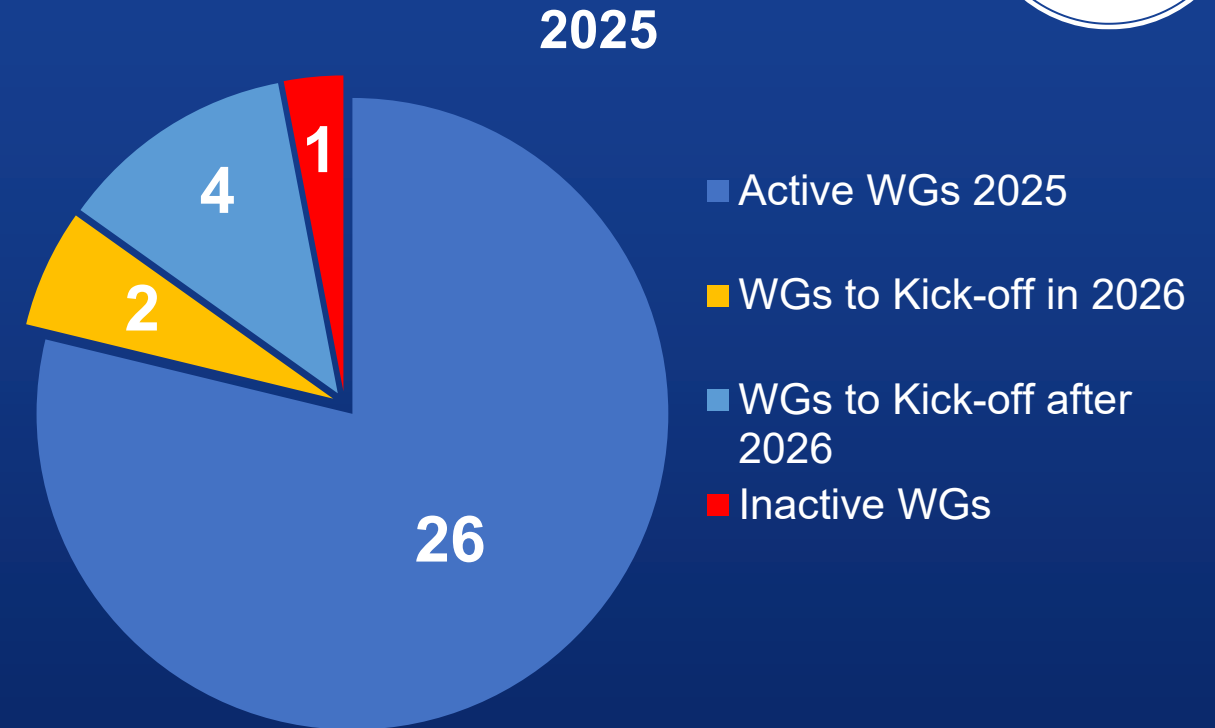
List of Key indicators



OGSM Goal 1 - EHEDG Working Groups 2024 & 2025



34 Working Groups



33 Working Groups



OGSM Goal 2



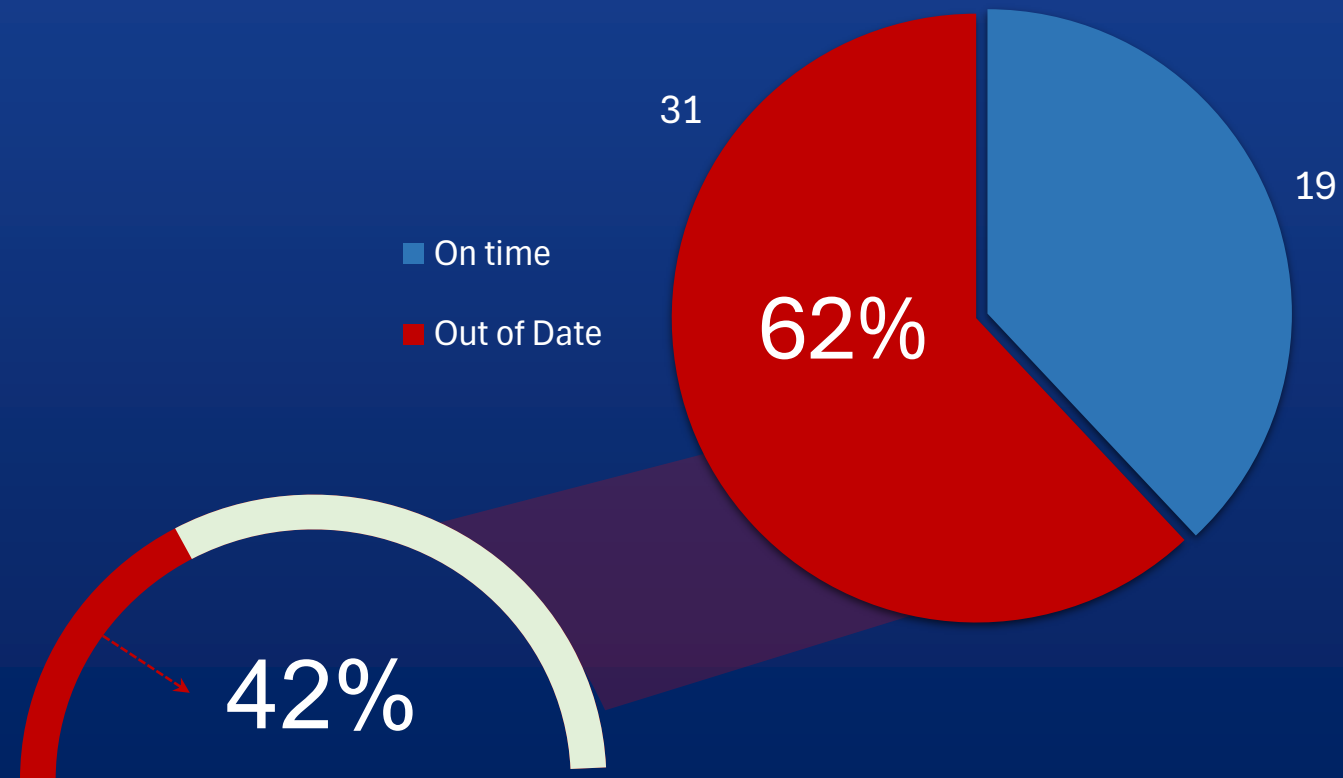
Maintain
Guideline portfolio
up to date, based
on industry needs
and hold
ourselves
accountable for
the 5-year
renewal cycle

30-10-2025

01.

Published Guidelines Status Sep 2024

Total of 50 documents



OGSM Goal 2



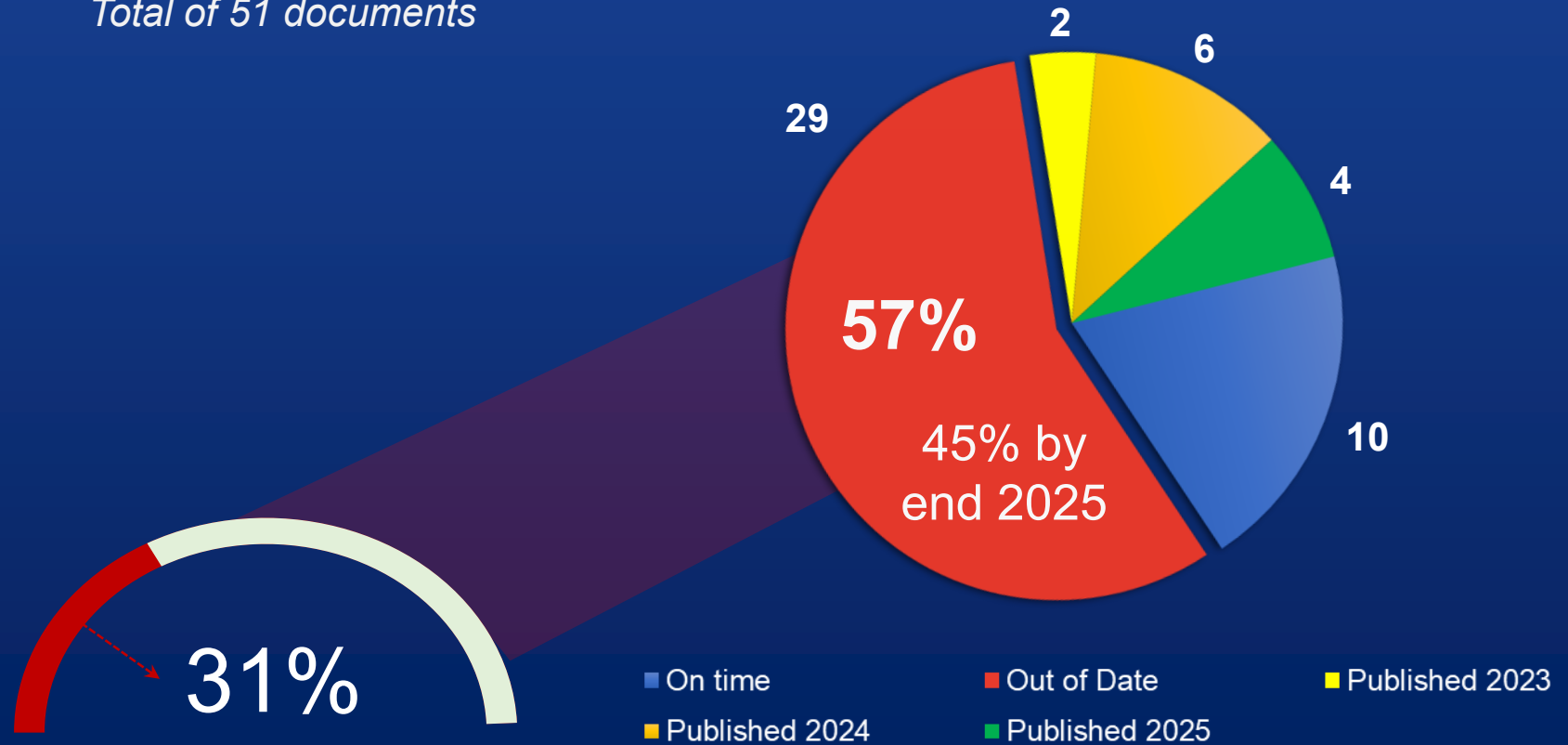
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01.

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OGSM Goal 2



Maintain
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30-10-2025

01.

Published Guidelines in 2025

4

WG	WG Chair	GL	GL Name
Valves	Uwe Heisswolf	20	Hygienic design and safe use of Mixproof valves
Separators	Reinhard Moss	42	Disc Stack Centrifuges - Design and Cleanability
Building design	Gun Wirtanen	44-2	Managing of Building Work and Equipment Installation/Removal During Food Production
Valves	Carsten Rosendal	65	Sampling Systems For Representative Liquid Sampling

Goals Explained



Maintain
Guideline portfolio
up to date, based
on industry needs
and hold
ourselves
accountable for
the 5-year
renewal cycle

02.

Guidelines Progress

8

Guidelines soon to be published (2025)

GL N°	GL Name	Publication
8	Hygienic Design Principles	Q4/2025
29-2	Hygienic design of packing systems for solid foodstuffs - part 2: Thermoforming Packaging Machinery	Q4/2025
28	Safe and Hygienic Treatment, Storage and Distribution of Water in Food and Beverage Factories	Q4/2025
12	Continuous or Semi-Continuous Thermal Treatment of Liquid Particulate Foods	Q4/2025
23-1	Use of H1 & HT1 Registered Lubricants	Q4/2025
22	General hygienic design criteria for the safe processing of dry particulate materials	Q4/2025
41	Hygienic Engineering of Diverter Valves in Process Lines for Dry Particulate Materials	Q4/2025
WP	White Paper on Sustainability	Q4/2025



Goals Explained



Maintain
Guideline portfolio
up to date, based
on industry needs
and hold
ourselves
accountable for
the 5-year
renewal cycle

02.

Guidelines Progress

11

Guidelines to be published (2026)

GL N°	GL Name	Publication
23-2	Production of H1&HT1 Food Grade Registered Lubricants	Q1/2026
38	Hygienic Engineering of Rotary Valves in Process Lines for Dry Particulate Materials	Q1/2026
62-1	Hygienic Design Criteria for Robots in Food Processing Environments – Part 1: Fundamental Requirements	Q1/2026
44	Hygienic Design Principles for Food Factories	Q1/2026
56	Foreign Bodies	Q1/2026
43	Hygienic Design of Belt Conveyors for the Food Industry	Q2/2026
60	Milling system for Dry Particulate Materials	Q2/2026
14	Requirements for Valves in Hygienic and Aseptic Processes	Q2/2026
39	Design Principles for Equipment and Process Areas for Aseptic Food Manufacturing	Q2/2026
63	Chocolate Processing	Q4/2026
37-2	Hygienic Design and Application of Sensors, Part 2	2026



Guidelines Progress

15



GL	Guideline	Last publication	Expected
34	Integrating Hygienic Entities	2020	
32-1	Materials of construction for equipment in contact with food	2005	
48	Elastomeric Seals	2022	
9	Welding stainless steel to meet hygienic requirements	1993	
47	Guidelines on Air Handling Systems in the Food Industry - Air Quality Control for Building Ventilation	2016	
17	Hygienic design of pumps, homogenizers and dampening devices	2020	
31	Hygienic Engineering of Spray Dryer and Fluid Bed Plants	2018	
33	Hygienic engineering of discharging systems for dry particulate materials	2005	
36	Hygienic Engineering of Transfer Systems for Dry Particulate Materials	2007	
38	Hygienic Engineering of Rotary Valves in Process Lines for Dry Particulate Materials	2017	
40	Hygienic Engineering of Valves in Process Lines for Dry Particulate Materials	2010	
59	Meat processing	New	
50	Hygienic Design requirements for CIP Installations	2019	
61	Maintenance	New	
64	Utilities	New	



Out of Date Guidelines – Discuss Next Steps # 10



Number	Guideline	Month	Year	Related to	Actions
1	Continuous Pasteurization of Liquid Food	May	2017	12 + 6	Start 2026-2027
6	Continuous UHT Sterilization of Liquid Food	May	2017	12 + 1	Start 2026-2027
10	Hygienic design of closed equipment for the processing of liquid food	May	2007	8	Will kick-off soon 2025
16	Hygienic pipe couplings	September	1997	P1+48	Removed from the website with reference to the position Paper on Pipe Couplings.
18	Chemical Treatment of Stainless-Steel Surfaces	January	2014	32	This topic will be addressed in the new materials of construction guideline on metals
19	A method for assessing the bacterial impermeability of hydrophobic membrane filters	June	2012	5	No action yet
5	A method for the assessment of in-line sterilisability of food processing equipment	July	2004	2	No action yet
7	A method for the assessment of bacteria-tightness of food processing equipment	July	2004	5	No action yet
46	Aseptic and Hygienic Filling Machines - Planning, Installation, Qualification and Operation	April	2018	29 + 34	No action yet
49	Hygienic Design Requirement for processing of fresh fish	October	2017		Chair needed



OGSM Goal 3



Develop a pool of
500+ specialists,
with their field of
expertise



Current pool is about 300+

Most WGs are “full” (feedback from WG Chairs)
What other activities can we initiate to engage our members?

- Corresponding members
- Peer reviewers

Will be further brainstormed during the FWGD tomorrow

Progress since FWGD Nov 2024

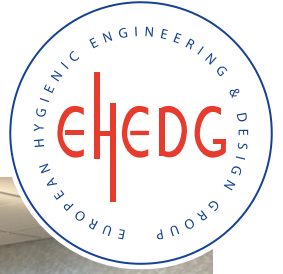


30-10-2025



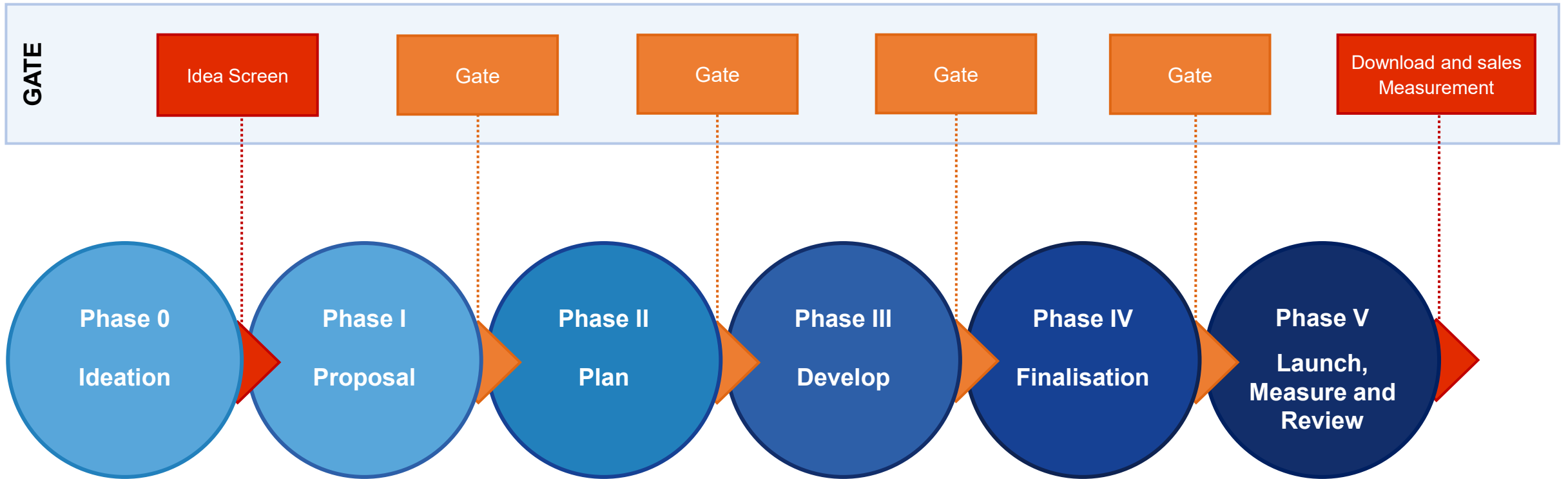
2025

....and CWGD May 2025



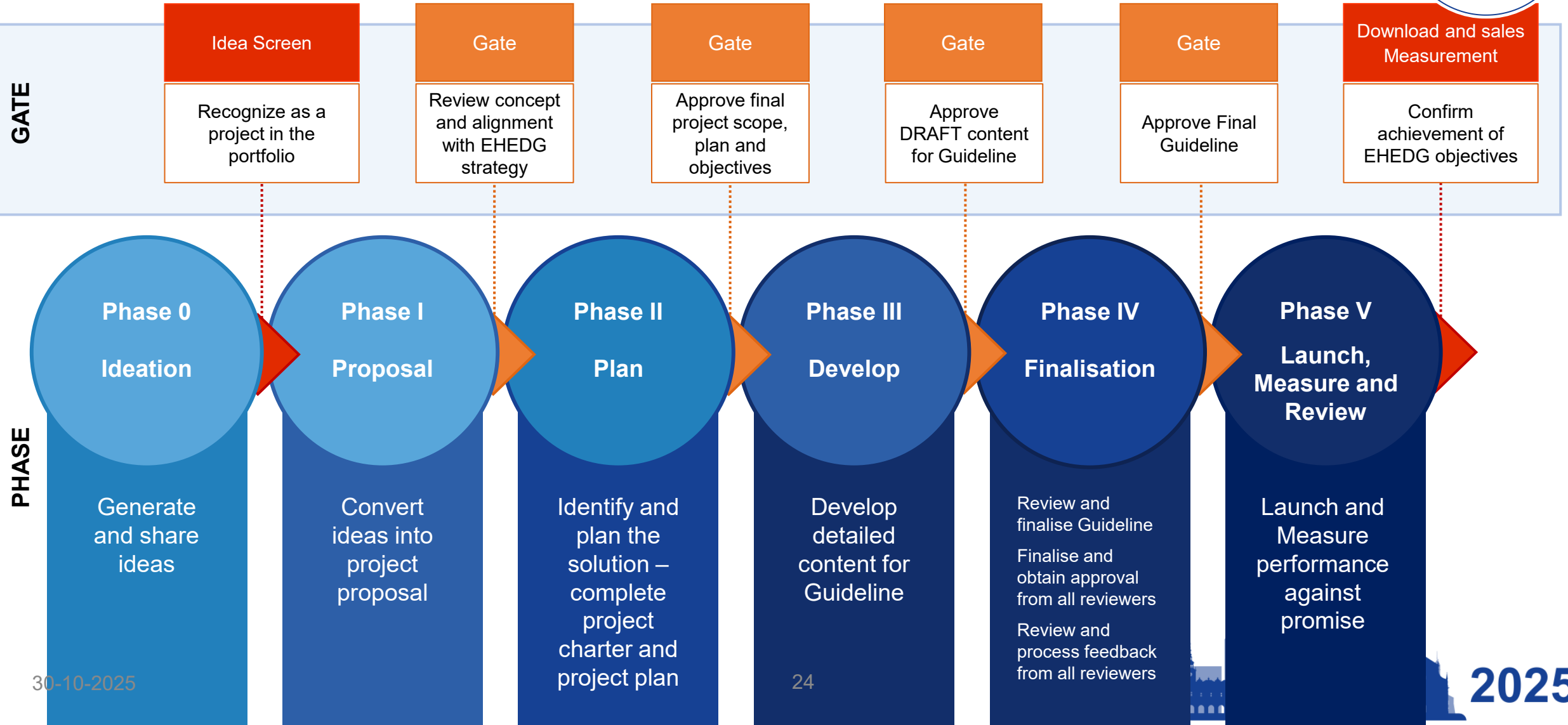
Our # 4 Tasks

1. Stage-gated Guideline Development Process
2. Guideline Template
3. Annual Plan
4. Symbols & Colour Coding



#1

Stage-Gated Guideline Development Process





Accountable For

Co-Chairs SCWG

- Ensuring EHEDG Portfolio is inline with the strategy
- Safeguarding scope, avoiding overlaps and contradictions
- Guides decision-making when strategic or organisational conflicts arise



Responsible For

- Collate future topics
- Review ideation proposals and prioritise topics
- Review and approve proposal, planning, budget, resources and major deliverables
- Initiate or terminate based on Gate Review outcome
- Signs off on key milestones and stage gates.
- Decide if topics should be further implemented, reworked or rejected
- Communicate Ideation decision to the idea generator, WG-Co-Chairs, Exco
- Assign WG Chairs to execute approved ideas
- Driving WG team compliance with Stage Gated process activities
- Providing strategic direction to WG chairs and teams
- Reports progress internally (e.g. FB, Exco, Adv Board)
- Builds and maintains relationships with key EHEDG members and stakeholders and ensures their interests and concerns are represented

WG Co-Chairs

- Ensure all phase deliverables are completed according to plan and timings and present them to the Gate Review Team in regular intervals
- Lead guideline development activities according to plan
- Organise and prepare Gate Review including status report
- Communicate Gate Review Team feedback to the WG team
- Create a pro-active working atmosphere and team alignment
- Guideline development management
- Ask feedback from peer reviewers
- Provide draft documents to peer reviewers

WG Team Members

- Contributing to the development of the guideline development

Peer-reviewers and corresponding authors

- Providing subject matter expert feedback on the content of the guidelines during various stages of development

EHEDG Office

- Organising the Portfolio and track WG and 3rd Party activities
- Drive launch and measure performance of the guidelines

- Develop content for guideline in alignment with project plan
- Address comments from Reviewers and obtain consensus together with WG Chair
- Attending and actively participating in WG meetings
- Delivering against agreed tasks

- Provide feedback on guideline Proposal and Table of Content.
- Provide feedback during guideline development upon request of WG on work in progress and the final draft

- Collect and organise idea screening
- Support planning and budgeting
- Support the WG activities in admin and IT
- Support the project team members in financial reimbursements
- Lead the Launch and Measure phase

Accountable For



Responsible For



Flexible, Targeted Guidelines

A New Template Approach

Breakout Sessions Spark a Unified, Modular Guideline Strategy

New guideline template proposal:

- **Equipment-type** (e.g. pumps, valves, sensors)
- **Process/Methods-type** (e.g. cleaning validation)
- **Technology/Product-type** (e.g. sector-specific: fish, meat, bakery)



Goal

One flexible template to manage different content types



Typical structure of different types of guidelines

Guideline Template for Equipment

1. Summary
2. Introduction
3. Objectives & Scope
4. Normative References
5. EHEDG Documents
6. Definitions
7. Hygienic Design Criteria
- ▶ 8. Functional Description
 - 8.1 [.....](#)
 - 8.2 [.....](#)
 - 8.3 [.....](#)
9. Design Features
 - 9.1 [.....](#)
 - 9.2 [.....](#)
 - 9.3 [.....](#)
10. Application and Use
11. Summary of Requirements
 - 11.1 [.....](#)
 - 11.2 [.....](#)
12. Key Learning Points

ANNEX A
ANNEX B

Guideline Template for Processes/Methods/Technology

1. Summary
2. Objectives & Scope
3. Normative References
4. EHEDG Documents
5. Process Description
 - 5.1 [.....](#)
 - 5.2 [.....](#)
6. Hygienic Design Criteria
 - 6.1 [.....](#)
 - 6.2 [.....](#)
 - 6.3 [.....](#)
7. System Design Concepts (Equipment)
 - 7.1 [.....](#)
 - 7.2 [.....](#)
 - 7.3 [.....](#)
8. Maintenance
9. Summary of Requirements
 - ▶ 9.1 [.....](#)
 - 9.2 [.....](#)
10. Key Learning Points
11. Definitions
12. References (Further reading)

ANNEX A
ANNEX B

Guideline Template for Products

1. Summary
2. Introduction
3. Objectives & Scope
4. Normative References
5. EHEDG Documents
7. Processing Conditions
- ▶ 8. Processing
 - 8.1 [.....](#)
 - 8.2 [.....](#)
 - 8.3 [.....](#)
9. General Considerations
10. General Considerations
- ▶ 11. Equipment
 12. Validation
 13. Maintenance
14. Procurement Recommendations
15. Key Learning Points
16. Definitions
17. References (Further reading)

ANNEX A
ANNEX B

What is behind the new approach?

1. A template for guidelines already exists.
With the exception of the cover sheet, however, it is differently interpreted by almost all working groups.
2. There are, of course, similarities, but these are not presented in a uniform manner.
We should agree on a common approach that is adapted to the needs of the various specific contents.
3. Work out the common ground.
Keep it simple and, above all, applicable to all scopes.

Essential content of a guideline (common ground)

- Introduction/Objective – Explains the purpose of the guideline, highlights its importance, and formulates the overarching objectives.
- Definition of terms – Defines terms used in guideline.
- Scope – Describes exactly for whom and under what conditions the guideline applies.
- Content – It is the core of the guideline. It lists the specific information, principles and procedures that should be followed
- References & Further reading – List of relevant literature and other documents.
- Annexes – Additional documents, drawings or information that support or explain the content of the guideline.



New Guideline Template

Introduction as a fixed section

Topic of the guideline as a flexible section

Closing as a semi-fixed section

Guideline Template for ...	
Introduction (fixed section)	Disclaimer 1. Abstract (Summary + Introduction) 2. Objectives & Scope (incl. target audience) 3. Normative References 4. EHEDG Guideline references 5. Glossary (Definitions / terms used in the guideline) 6. Key Learning Points
Topic of the guideline (flexible section)	This section can be adapted to the specific requirements of the guideline and its topic. 7. - Functional description, process description, - Hygienic (design) requirements - Specific requirements - System design concepts - Application of Equipment - Maintenance & Service - Validation - Summary of requirements - n.
Closing (fixed section)	n+1. Sustainability (if applicable) n+2. References & Further reading ANNEX A (if necessary) ANNEX B (if necessary)




Launch of the new template for guidelines

- For ongoing projects, the WGs can continue with the existing template till 31st Dec 2026
Note: if you like you can use the new template
- For new projects, the WGs should use the new template from 1st of January 2026 onwards – a new EHEDG Macro Template will be ready for this



- As regional sections
- From 2026 onwards
- Request to WG co-chairs



European Hygienic Engineering & Design Group

22/09/2025

Working Group Activity Plan 20yy

Working Group <<Insert Working Group Name>>

Guideline << insert guideline(s) number(s)>>


(Co-)Chair(s) <<insert (co-)chair(s) name(s)>>

Stichting EHEDG
Korndijkstraat 8
1101 CJ Amsterdam
The Netherlands

E-Mail: office@ehedg.org
Website: www.ehedg.org
Phone: +31 6 10219555

Reg.-No.: 24292365 at the Chamber of
Commerce Rotterdam
VAT-No. NL 807854013 B01

President: Hein Timmerman
Director: Adley van den Berg



European Hygienic Engineering & Design Group

1. About EHEDG Working Group <<Insert Working Group Name>>

Information about your EHEDG Working Group, members, peer reviewers and related guidelines.

Table 1. EHEDG Working Group <<insert working group names>> 20yy.

Please update your Working Group member overview for 20yy including the names of (Co-)Chair(s), Secretary, Planner and any other Working Group Members. Also, explain changes in the team, new roles or any relevant information.

EHEDG Working Group

Position	Name	Position	Organisation	Availability (~hrs/m)
(Co-)Chair				
Co-chair				
Secretary				
Planner				
Member				
Member				
Member				


<<Add your comments>>

Stichting EHEDG
Korndijkstraat 8
1101 CJ Amsterdam
The Netherlands

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Website: www.ehedg.org
Phone: +31 6 10219555

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President: Hein Timmerman
Director: Adley van den Berg




European Hygienic Engineering & Design Group

Table 2. EHEDG **Insert Working Group**. Peer reviewing members.

Please, give an overview of the subject matter experts that you engaged as peer reviewers for your guideline(s) production reading, editing and providing your working group with feedback, on the early development phases (before the actual writing on the guideline starts), each chapter or paragraph written or after each working group meeting, as well as your final draft.

EHEDG members / peer reviewers

Name	Position	Organisation	Comment / Feedback







European Hygienic Engineering & Design Group

Table 3. EHEDG Related Guidelines.

List the guidelines related to the guideline(s) that your working group is conducting:

Guideline number	Guideline title

Reserved Colours

Colour	Material	RGB Definition	CMKY Definition
	Product	0,176,240	100,27,0,6
	Water / Condensate	182,221,232	22,5,0,9
	Bacterial film or soil	255,192,0	0,25,100,0
	Detergent	0,255,0	100,0,100,0
	Low Hygiene Risk	0,176,80	100,0,55,31
	High Hygiene Risk	255,0,0	0,100,100,0
	Critical attention area		
	Medium Hygiene Risk	255,255,0	0,0,100,0
	Oil/Food Quality grease	255,240,0	0,6,100,0
	Disinfecting agent	153,0,204	25,100,0,20
	Elastomeric seal	153,153,153	0,0,0,40
	Weld	77,77,77	0,0,0,70
 30-10-2025	Buffer/Barrier Fluid	22,65,148	85,56,0,42

- New Colours are agreed on
- Except for metal, welds and elastomers (grey and black grading levels needs to be defined)



Working Groups Days 2026



20-21 May Chairs and Co-Chairs
Working Group Day (CWGD)



4th - 5th November. All members of the
Working Groups (FWGD)

Group Session Topics



01 | Group Session



120 people (#10 groups) each group will discuss 2 topics



1. Ideation phase
2. Proposal phase
3. Plan phase
4. Develop phase
5. Finalisation
6. Launch, Measure and Review
7. Key learning points
8. Roles, responsibilities and soft skills in WG
9. Onboarding young/new/interested Subject Matter Experts (SMEs)
10. Certification requirements

Workshop Groups



Group 2 – Proposal Phase/ Key learning Points

1. Oladipo Adedokun
2. Peter Bradley
3. Giuseppe Allais
4. Joe Matthews
5. Martijn van der Hoeven
6. Debra Smith
7. Dimitri Tavernarakis
8. Markus Rober Lamche
9. Danijel Tolic
10. Andries Louw Wolthuizen
11. Chris Garland
12. Knuth Lorenzen

Group 3 – Plan Phase / Roles, Resp. & soft skills

- | | |
|-----------------------|-----------------------|
| 1. Garry Pearson | 7. Janyce Franc |
| 2. Marcin Rebalski | 8. Thomas Kleimann |
| 3. Radosław Olszewski | 9. Carsten Rosendal |
| 4. Karsten Ludewig | 10. Francesco Mattana |
| 5. Bengt Eliasson | 11. Maciej Mielnik |
| 6. Steve Arnold | 12. Xu Yi |

Group 4 – Develop Phase / Onboarding young/new/interested SME's

- | | |
|-------------------|----------------------|
| 1. Herwig Nollet | 7. Perry Peters |
| 2. Frans Saurwalt | 8. Markus Schröer |
| 3. Jitendra Rai | 9. Javier Lemus |
| 4. Peter Tips | 10. Uwe Heisswolf |
| 5. Devin Damdhul | 11. Bertil Andersson |
| 6. Ole Poulsen | 12. Sophie Daulmerie |

Group 1 – Ideation / Launch, measure and review

1. Christian Sommer
2. Tom Waters
3. Edyta Margas
4. Alexander Maroto
5. Sebastian Wilhelm
6. Carla Gomes
7. Miha Jevnikar
8. Lisa Bullens
9. Anett Winkler
10. Hui Zhang
11. Václav Králíček



Group 5 – Finalisation / Certification requirements

- | | |
|------------------------|-------------------------------|
| 1. Simon Burns | 7. Eric Partington |
| 2. Frank Moerman | 8. Alan Friis |
| 3. Kelly Maria Calixto | 9. Georg Kalss |
| 4. Bernd Roser | 10. Constantinus Anastasyadis |
| 5. Mieke Heymans | 11. Michal Rabczuk |
| 6. Joerg Zacharias | 12. Diego Mirabelli |

Workshop Groups



Group 8 – Plan Phase / Roles, Resp. & soft skills

1. Gun Linnea Wirtanen
2. Bjarne Larsson
3. Lars Chluba
4. Bo Jensen
5. Eva Fleischmann
6. Stefan Akesson
7. Håkan Christensen
8. Hubert Bocquet
9. Irene Llorca
10. Andreas Ritzl
11. Xavier Le Roux
12. Hemant Ghule

Group 9 – Develop Phase / Onboarding young/new/interested SME's

1. John Holah
2. Dennis Holmud
3. Liliana Maddalena
4. Ferdinand Schwabe
5. Giovanni Valente
6. Patrick Wouters
7. Peter Golz
8. Nicolas Barril
9. Christian Geubert
10. Diego Mirabelli
11. Zhanar Sadyk
12. Greg Harper

Group 7 – Proposal Phase/ Key learning Points

1. Adrian Majchrzak
2. Adam Ruskin
3. Natacha Holmud
4. Jürgen Hofmann
5. Andreas Klemm
6. Martin Barnickel
7. Peet Grobler
8. Shanghua Li
9. Felix Schottroff
10. Luca Ollari
11. Stefan Andersson
12. Pär Ström

Group 6 – Ideation / Launch, measure and review

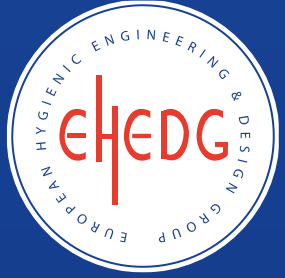
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|----------------------|-----------------------------|
| 1. Emde Heiko | 7. Marco Antonio León Félix |
| 2. David Lowry | 8. Murat Merdin |
| 3. Matilda Freund | 9. Elena Zuck |
| 4. Enrico Visconti | 10. Peter Merhof |
| 5. Mike Waskow | 11. Eelco Baten |
| 6. Ana Dymond Soares | 12. Gabriele Meesters |

Group 10 – Finalisation / Certification requirements

1. Nigel Blitz
2. Dirk Nikoleiski
3. Hein Timmerman
4. Maik Bluhm
5. Roland Cocker
6. Aritz Murgia
7. Piyush Kumar Jha
8. Marc Mauermann
9. Jonas Stinnerbom
10. Jens Bergmann
11. Tobias Braunegger
12. Ronen Hurni



Active Working Groups_ Krakow

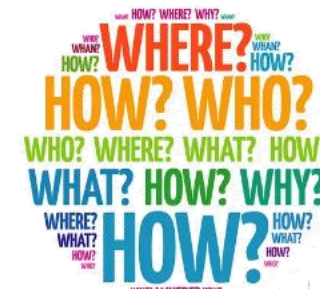


- | | |
|----|---------------------------|
| 1 | Chocolate WG |
| 2 | Cleaning in place WG |
| 3 | Building design WG |
| 4 | Dry Materials handling WG |
| 5 | Elastomeric seals WG |
| 6 | Integration systems WG |
| 7 | Heat treatment WG |
| 8 | Maintenance WG |
| 9 | Materials of construction |
| 10 | Packaging Machines |
| 11 | Robotics WG |
| 12 | Utilities WG |
| 13 | Valves WG |
| 14 | Welding WG |





Contact: Patrick Wouters – patrick.wouters@ehedg.org





Group Session Instructions

Group Sessions - Instructions

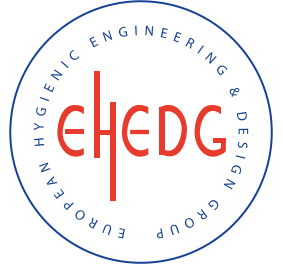


Please **discuss** in your team the respective stage gated process / topic for which your group will get a couple of hand-outs

- Review the key activities / to be completed
- Reflect on how you are currently operating and map out what you should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important
- **Timing:**
 - Morning till lunch to review and discuss in your team
 - After coffee there will be 15 mins to ask questions
 - After lunch prepare feedback presentation of max. 10 mins (ideally digitally)



Instructions Topic 1



Your group will discuss the topic **Ideation phase**

Please follow the instructions below and see the proposal

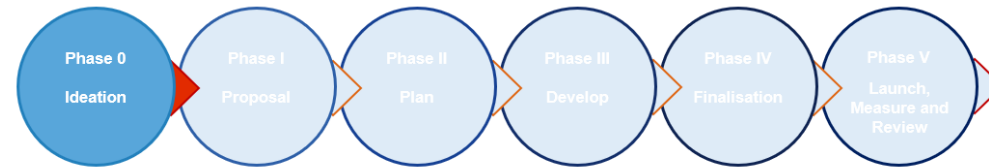
- Review the key activities / to be completed in this project phase
- Reflect on how you are currently operating and map out what you should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
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Phase 0 - Ideation



Objective

The objective of Phase 0 – Create ideas for potential inclusion into the EHEDG portfolio

Explanation

The Ideation phase is where new ideas are generated, reviewed, and evaluated to determine their potential fit within the EHEDG portfolio. During this ideation phase the guideline ideas including key topics, objectives, and a brief abstract are expected to be submitted. These proposals are then prioritised and reviewed for approval by the EHEDG Subcom Working Groups Chairs and presented to the Exco.

Depending on the outcome:

- Approved ideas will progress to the next phase for implementation.
- Unapproved ideas may be reworked or removed from the portfolio.

Activities

Ideation phase activities:

Idea proposal activities:

- Write key objectives, purpose and brief abstract for the topic
- Indicate the target audience
- Identify key risks and uncertainties
- Rework ideas if they have been rejected with comments for improvement

Chairs Subcom WG and Screening Group activities:

- Collate topics
- Review and prioritise topics
- Decide if topics should be further implemented, reworked or rejected
- Communicate decision to the idea generator, WG-Co-Chairs, Exco and other relevant stakeholders
- Define the next steps

Instructions Topic 2



Your group will discuss the topic **Proposal phase**

Please follow the instructions below and see the proposal

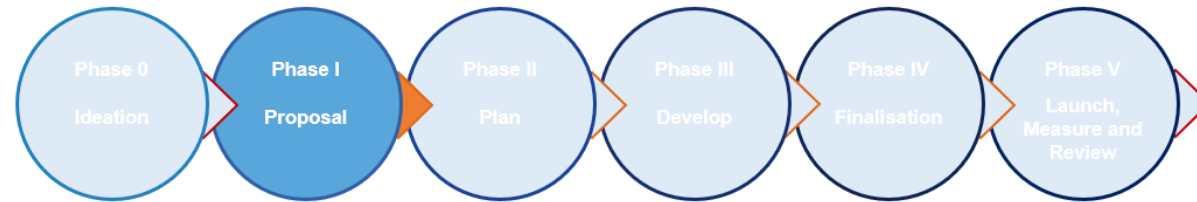
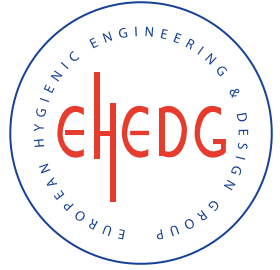
- Review the key activities / to be completed in the project phase and gate review
- Reflect on how you are currently operating and map out what you/EHEDG should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

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Phase I - Proposal



Objective

The objective of Phase I - Proposal is to convert the project idea into a project proposal

Explanation

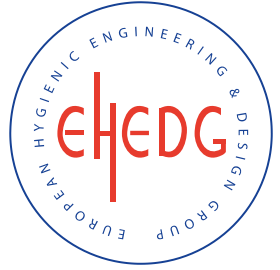
The Proposal phase is when ideas are converted into a project proposal. The project proposal aims to define the objectives and ensuring they are aligned with the EHEDG strategy / SCWG strategy and the guideline portfolio. Key risks and uncertainties have been identified.

Activities

Proposal phase activities of a typical project:

- Identify project roles (e.g., WG Sponsor, WG Co-Chair, Guideline audience, Gate Review Team, Peer reviewers)
- Identify names and roles within the WG (e.g. (co-)chair, minute taker, planner, liaison between WG)
- Define Guideline objectives
- Define Guideline scope
- Review relevant EHEDG and other related Guidelines
- Prepare guideline abstract
- Describe target audience
- List related guidelines and WG's
- Identify key risks and uncertainties
- Define next steps for following phase

Gate Review Phase I - Proposal



The Gate Review will validate the alignment with the EHEDG strategy

Gate Activities to Review

From the Project (WG Team), the Gate Review team should have a clear understanding of:

- Identify project roles (e.g., WG Co-Chair, Guideline audience, Gate Review Team, Peer reviewers)
- Prepare and execute a call for individuals for project roles
- Identify names and roles within the WG (e.g. (co-)chair, minute taker, planner, liaison between WG)
- Define Guideline objectives
- Define Guideline scope
- Review relevant EHEDG and other related Guidelines
- Prepare guideline abstract
- Describe target audience
- List related guidelines and WG's
- Identify key risks and uncertainties
- Define next steps for following phase

The key decision factors:

- *The project is aligned with the EHEDG strategy*
- *Resource availability*

Gate Considerations

Results:

- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No

The key decision :

- Yes/No
- Yes/No

Instructions Topic 3



Your group will discuss the topic **Plan phase**

Please follow the instructions below and see the proposal

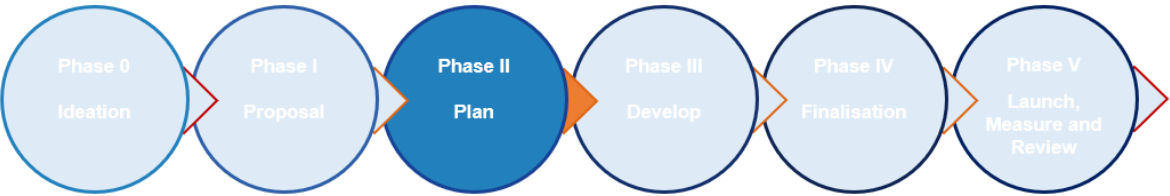
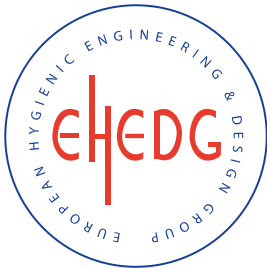
- Review the key activities / to be completed in the project phase and gate review
- Reflect on how you are currently operating and map out what you / EHEDG should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

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Phase II - Plan



Objective	
The objective of Phase II is to develop the detailed project plan based on the agreed Guideline scope incl. training course material	
Explanation	
<p>The Plan phase is when the activities are further identified and detailed plans are ready for the Guideline content development.</p> <p>Key risks have been identified and adequately mitigated.</p> <p>A driver of success during Phase II - Plan is effective alignment of the opinions/input of the (cross-functional) WG team.</p> <p>NOTE: When planning is not done prior to initiating the development, projects are inefficiently executed and under-perform against timing and objectives.</p>	
Activities	
Plan phase activities of a typical project: Phase II - Plan	
<p>Phase II</p> <p>Activities shall include, but is not limited to:</p> <ul style="list-style-type: none">• Select and appoint project roles• Conduct kick-off meeting• Review and freeze Guideline scope• Develop Table of Content• Define key learning point of the guideline• Prepare detailed time plan including milestones (meetings) and individual responsibilities, deliverable end date• Agree on plan for training course deliverables• Agree on certification requirements (if applicable)	<ul style="list-style-type: none">• Agree on time commitment from individual WG members• Maintain (Project) Risk identification list and mitigation strategy• Define next steps for following phase• Sign NDA for the Guideline content• Define estimated required budget based on planning (e.g., f2f meetings, illustrations) and obtain approval from EHEDG Director



GATE REVIEW: Phase II – Plan



The Plan Gate will approve the plan for the project

Gate Review Team Expectations

From the Project Team, the Gate Review team should have a clear understanding of (where applicable):

- Select and appoint project roles
- Conduct kick-off meeting
- Review and freeze Guideline scope
- Develop Table of Content
- Define key learning point of the guideline
- Prepare detailed time plan including milestones (meetings) and individual responsibilities, deliverable end date
- Agree on plan for training course deliverables
- Agree on certification requirements (if applicable)
- Agree on time commitment from individual WG members
- Agree on time commitment from individual WG members
- Maintain (Project) Risk identification list and mitigation strategy
- Define next steps for following phase
- Sign Non-Disclosure Agreement (NDA) for the Guideline content
- Define estimated required budget based on planning (e.g., f2f meetings, illustrations) and obtain approval from EHEDG Director

The key decision factors:

- *Selected scope and content solutions are aligned with EHEDG strategy and has strategic fit to the Guideline portfolio*
- *Project Plan and timings are present*
- *Key risks have been adequately investigated and mitigated*
- *Resources are in place to successfully complete project*

Gate Considerations

Results:

- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No

The key decision :

Instructions Topic 4



Your group will discuss the topic **Development phase**

Please follow the instructions below and see the proposal

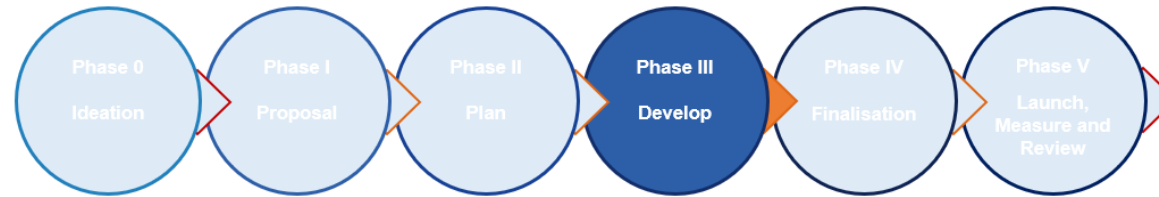
- Review the key activities / to be completed in your project phase and gate review
- Reflect on how you are currently operating and map out what you / EHEDG should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

- Morning till lunch to review and discuss in your team
- After coffee there will be 15 mins to ask questions
- After lunch prepare feedback presentation of max. 10 mins (ideally digitally)



Phase III - Develop



Objective

The objective of Phase III is to develop the final draft Guideline ready for peer-review

Explanation

The Development phase is when the detailed plan for execution is executed leading to the development of the final draft Guideline that has been agreed by all WG members and is ready for the next formal peer-review of all relevant stakeholders.

Activities

Develop phase activities:

Activities shall include, but is not limited to:

- Develop and agree content based on the defined scope, including illustrations
- Ensure all illustrations meet EHEDG colour coding requirements
- Align with all individuals, that are appointed in the different project roles, the content development and project deliverables, incl. training material development
- Monitor alignment with project deliverables
- Maintain (Project) Risk identification list and mitigation strategy
- Request financial support for meetings and travelling (if applicable)
- Define next steps for following phase

Gate Review: Pase III - Develop



The Develop Gate will approve the draft Guideline content for the project

Gate Review Team Expectations	Gate Considerations
<p>From the Project Team, the Gate Review team should have a clear understanding of (where applicable):</p> <ul style="list-style-type: none">DRAFT Guideline is meeting project charter requirementsUpdated Charter, Financials, Project Plan & Evaluation Criteria <p>The key decision factors:</p> <ul style="list-style-type: none"><i>Plans for Review and Finalization process are in place</i>	<p>Results:</p> <ul style="list-style-type: none">Yes/NoYes/NoYes/No <p>The key decision :</p>



Instructions Topic 5



Your group will discuss the topic **Finalisation phase**

Please follow the instructions below and see the proposal

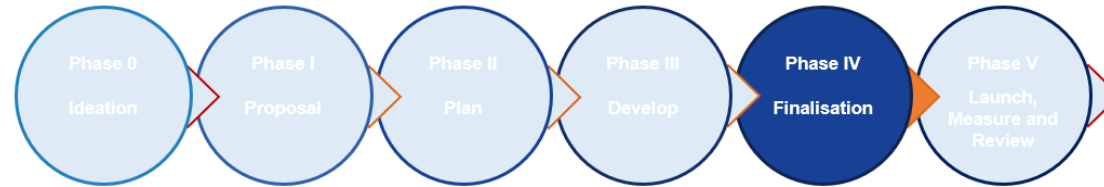
- Review the key activities / to be completed in this project phase and gate review
- Reflect on how you are currently operating and map out what you / EHEDG should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

- Morning till lunch to review and discuss in your team
- After coffee there will be 15 mins to ask questions
- After lunch prepare feedback presentation of max. 10 mins (ideally digitally)



Phase IV - Finalisation



Objective

The objective of Phase IV is to finalise and approve the Guideline

Explanation

The Review phase is when the final draft Guideline is reviewed, and comments are addressed into a revised Guideline that is approved, language check completed and ready for launch. At the end of this phase the WG team (led by the WG Co-Chairs) has delivered against the project objectives.

Activities

Review phase activities

Activities include:

- Send the final draft Guideline to all peer-reviewers and agree time-line to provide feedback
- Address all comments from the peer-reviewers
- Coordinate and provide feedback to the peer-reviewers
- Organise meetings with reviewers to discuss the comments (if necessary)
- Inform all stakeholders on publication decision
- Finalise the Guideline for the language check
- Discuss feedback from language check and prepare final Guideline for editorial check
- Coordinate look and feel of the final Guideline with EHEDG Office
- Participate in marketing and communication preparation (e.g. interviews, webinars, presentations)
- Provide support to the development and review the related training materials
- Close (Project) Risk identification list and mitigation strategy
- Request financial support for meetings and travelling (if applicable)

Gate Review: Phase IV - Finalisation



Gate Review Team Expectations

From the Project Team, the Gate Review team should have a clear understanding of (where applicable):

- That the finalised Guideline has considered all the feedback from the reviewers and that the reviewers have been made aware about the final decisions of the WG
- That there is full consensus about the content of the new Guideline
- Updated Charter, Financials, Project Plan
- Launch Plan / developed detail plan for execution
- The success or issues during launch
- Budget overview

The key decision factors:

- *Achievement of project objectives*
- *Goals and targets are met*
- *Product / process is sustainable within the ongoing organization*

Gate Considerations

Results:

- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No
- Yes/No

The key decision :



Instructions Topic 6



Your group will discuss the topic **Launch, Measure and Review phase**

Please follow the instructions below and see the proposal

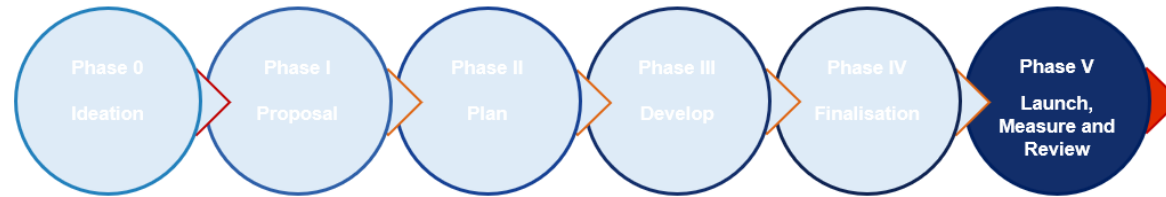
- Review the key activities / to be completed in this project phase
- Reflect on how you are currently operating and map out what you / EHEDG should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

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- After lunch prepare feedback presentation of max. 10 mins (ideally digitally)



Phase V – Launch and Measure



Objective

The objective of Phase V is to communicate the publication of the new Guideline and measure the indicators of Guideline relevance

Explanation

The Launch and Measure phase is initiated after the Guideline has been approved and ready to be published. A primary driver of success during Phase V – Launch and Measure is to measure against the identified Key Performance Indicators.

Activities

Launch and Measure phase activities of a typical project: Phase V – Launch and Measure consists of bringing the approved Guideline to the market and checking the success of the Guideline against the identified key performance indicators

Phase V - Launch and Measure

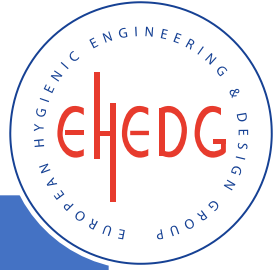
Activities include (but may not be limited to):

- Complete Project Review
- Go-live with the Guideline on website/shop
- Go-live with interviews and other communications
- Publish through the identified channels
- Close project and recognize all those involved in the delivery of the new Guideline
- Review Guideline development process (what went well, opportunities for improvement, lessons learned, etc.)

- Measure against the pre-defined KPI's
- Support and report activities associated to communication and training by WG and others



Examples KPI's/Success/Benefit factors



	WG	Chairs SCWG	EHEDG
Examples and define numbers	<ul style="list-style-type: none"> • Number of meeting participants • Frequency of meetings • Timeline for document publication • Delivering on time on milestones/ project plan • Budget adherence • Ensuring correct cross-references to other guidelines are made 	<ul style="list-style-type: none"> • Relevant and number of peer reviewers per guideline • Quality and number of guidelines • Progress against OGSM • Number of active members to write guidelines • New project proposals • Number of organized FWGD and CWGD, number of participants, and feedback scoring 	<ul style="list-style-type: none"> • Number of downloads and purchases • Number of references • LinkedIn likes on publishing communications • Invitations at e.g., expert meetings, webinars to talk about the topic of the guideline • Number of new equipment certificates • Scoring on the training materials • Guideline writing leading to cross-company networking



Instructions Topic 7



Your group will discuss the topic **Key learning points**

Please use the instructions below

- Define and agree what key learning points are for a guideline
- How should key learning points be addressed in a guideline
- How should key learning points be addressed by the training material developers
- Reflect on how you / EHEDG is currently operating and map out what should / could be done differently
- Identify activities that you / EHEDG still need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

- Morning till lunch to review and discuss in your team
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Instructions Topic 8



Your group will discuss the topic **Roles, responsibilities and soft skills in WG**

Please use the instructions below

- Review the key activities / to be completed by a WG at each phase (see next pages)
- Define tasks and roles within a WG (next to the WG Co-Chairs) to make the guideline development/revision process more effective
- Define soft skill set for each defined role
- Reflect on how you are currently operating and map out what you should / could do differently
- Identify activities that you / EHEDG need to address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

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Instructions Topic 9



Your group will discuss the topic **Onboarding young/new/interested Subject Matter Experts (SMEs)**

Please use the instructions below:

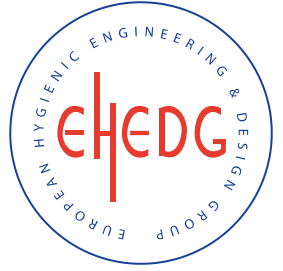
- Discuss ways to onboard young/new/interested SME's in WG's or other guideline development activities
- How can we deal with WG's that are 'full', while people are interested in the topic
- Discuss which type of stakeholders are currently not well represented in our Working Groups
- Discuss how we can motivate (under represented) stakeholders to participate, knowing that we have a pool of approx. 5000 people
- Identify activities that you / EHEDG still need to / could address and set milestones for them
- Define any other aspects that your group determined to be important

Timing:

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Instructions Topic 10



Your group will discuss the topic **Certification requirements**

Please follow the instructions below:

- Discuss how EHEDG has to manage “shall” and “should” language in our *guidelines* with respect to certification
- Propose new future guidelines or research topics that we would need for complex / integrated equipment or complete process certification
- Discuss if the current test methods guidelines (2, 5, 7, 57) should remain part of the guideline portfolio or should be e.g. an available SOP
- Discuss any future needs regarding alignment of guideline content with certification process
- Reflect on how you are currently operating and map out what you should / could do differently
- Identify activities that you / EHEDG still need to address and set milestones for them
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