

Summary of Advocacy Committee Meeting  
August 12, 2016 Garden Grove, California

1. Call to order

Steve Arms called the meeting to order at 9:00 am PDT, August 12, 2016, on the last day of conference. Attendance is recorded in Attachment 1, based on those present after the session moved out of the ballroom into a smaller meeting room.

2. Approval of minutes

No minutes were approved. This leaves the July 7, August 4 and the current document for approval at the next meeting.

3. Introducing the Committee and its activities

Steve first reviewed the committee membership and activities from the past year. The presentation he used is included in Attachment 2. He identified the Ambassadors to non-NELAP states who are included in the Advocacy committee, named the upcoming newsletter editors, described the formation of the Marketing and Outreach subcommittee, and discussed the committee's progress on its assigned items in the TNI Strategic Plan.

Since there were only a handful of non-committee member participants in the entire ballroom, after the initial presentation, the working session of the committee was moved to one of the smaller meeting rooms where people could better interact.

3. Review of Highlights from Orange County conference

Steve reviewed the highlights of the meeting with participation from attendees.

Monday:

- The Mentor Session was well presented and well attended. The group discussed how to leverage the content into broader distribution, post-conference.
- The NGAB session presented a proposed restructuring of TNI so that all AB recognition activities would be grouped together, but with NELAP still clearly separated from the others (NEFAP, PTPs, and NGAB.)
- ELAB had a major focus on the previously offered white paper from the WET Expert Committee (first raised at conference in Tulsa) with Katie Payne of the WET committee presenting.
- The NELAP AC and LASEC both met, with a major focus on the revised standards modules. There needs to be a substantial effort by Advocacy to promote the 2016 standard, including a summary of the changes and why they were needed, plus cover sheets for the modules.
- The IT Committee met with the NELAP AC over lunch, to discuss LAMS and suggest that the revised Volume 2 needs to require reporting by ABs into the LAMS database.

Tuesday:

- Advocacy representatives met with managers from the EPA OGWDW Technical Support Center as well as representatives of the NELAP AC and LASEC to further discuss how to establish “equivalent effectiveness” among the various drinking water certification programs and the NELAP accreditation program. Donna Ringel, EPA Liaison to the AC, offered to provide the short list of criteria that she looks at when accompanying NELAP Evaluation Teams in her Region 2 states, and the AC will likely turn those into a policy document to accompany the NELAP evaluation process.
- The Technology Showcase turned out to be well attended and appreciated.

Wednesday:

- The California session indicated that CA will opt for a single program, even with the large number of small labs in the state (350.) Participants discussed that the TNI Standard has in some ways failed the small lab community, but expressed hope that the revision to the Small Lab Handbook (due from QS Expert Committee by Houston conference) will be more helpful.
- We also discussed taking a “futures” approach to the Small Laboratory Advocacy Group (SLAG,) since the management aspects of the standard seem to be more intimidating than the technical aspects, to small labs. The SLAG effort definitely needs to be reinvigorated. TNI needs to ensure that its public presentations address small lab issues, and some way to monitor the SLAG bulletin board must be developed so that queries get a response – perhaps the TNI Expert Committees should be involved with this?
- Other suggestions were that a single “point person” who is a strong leader should be in place for SLAG, that TNI could offer the option to pair a mentor with interested small labs, offering webinars for a nominal fee and that the ambassadors could collect information about “stumbling blocks” for small labs seeking accreditation. Also, the use of a survey or focus groups to identify needs was offered, perhaps in conjunction with rural water lab meetings. All recognize that the mandate for two PTs per year is a major issue for small labs, and the biggest reason they opt for the lower tier of certification when it’s available.
- Several participants expressed hope that if the small lab accreditation issues could be resolved for CA, then TX, WI and KS could then contemplate bringing their states’ small labs into their accreditation programs. In particular, the Technical Director qualifications need to be revisited. Suggestions were that requirements should be “relaxed” for small labs or that an operator permit be acceptable as TD qualification.
- The LAB Expert Committee session focused on a presentation and live demo of the updated Generic Application. It is ready for “beta-testing” and just needs a willing AB and a few willing labs to participate.

Thursday was devoted to Expert Committee discussions of the changes to their respective modules of the standard.

## 5. The Fall Newsletter

Robin Cook will be the editor of the next TNI newsletter. Articles and authors recommended by the Advocacy Committee are listed below:

ARTICLE & Description	Authors	Email for Authors
The 2016 Standard A promo piece for the final standard, w/ a plan for roll-out w/ implementation schedule if possible, workshops across the nation. Note that FL may be an early adopter.	Jerry Parr	Jerry.parr@nelac-institute.org
PTPEC – new FoPT tables for SCM and NPW	Maria Friedman Ilona Taunton	<a href="mailto:gamfriedman@gmail.com">gamfriedman@gmail.com</a> Ilona.taunton@nelac-institute.org
Looking forward to Houston	Jerry Parr	Jerry.parr@nelac-institute.org
From the Chair	Alfredo Sotomayor	asotomayor@mmsd.com
Nominations to the Board with voting schedule	Sharon Mertens	smertens@mmsd.com
The QMP Article to be written IF checklists are available for committee self-audits	Lynn Bradley	Lynn.bradley@nelac-institute.org
The Charlie Carter Award Member spotlight on Richard Burrows	Stephanie Drier	stephanie.drier@state.mn.us
Post-conference Summary	Jerry Parr Lara Phelps	<a href="mailto:Jerry.parr@nelac-institute.org">Jerry.parr@nelac-institute.org</a> , <a href="mailto:phelps.lara@epa.gov">phelps.lara@epa.gov</a>
Upcoming Events	Jerry Parr	<a href="mailto:Jerry.parr@nelac-institute.org">Jerry.parr@nelac-institute.org</a>
CA's Expert Panel Decision (if available in time)	Lara Phelps Steve Arms	<a href="mailto:phelps.lara@epa.gov">phelps.lara@epa.gov</a> <a href="mailto:arms.steve@comcast.net">arms.steve@comcast.net</a>
Ambassador Updates Identify ambassadors and itemize substantial progress where possible	Steve Arms Carol Batterton	<a href="mailto:arms.steve@comcast.net">arms.steve@comcast.net</a> <a href="mailto:carbat@beecreek.net">carbat@beecreek.net</a>
FL rulemaking (if complete)	Steve Arms Vanessa Soto	<a href="mailto:arms.steve@comcast.net">arms.steve@comcast.net</a> <a href="mailto:vanessa.sotocontreras@flhealth.gov">vanessa.sotocontreras@flhealth.gov</a>
KY Status (may be incorporated into Ambassador Update, depending on length)	Zonetta English Patrick Garrity	<a href="mailto:english@msdlouky.org">english@msdlouky.org</a> <a href="mailto:patrick.garrity@ky.gov">patrick.garrity@ky.gov</a>
Update on WY and AK Only if substantial change underway	Jerry Parr	<a href="mailto:Jerry.parr@nelac-institute.org">Jerry.parr@nelac-institute.org</a>

## 6. Additional Activities and Action Items Identified during discussion

Jerry will write a letter to CA about clarifying the PT requirements, after requesting that PTPEC provide pass/fail rates for inclusion into the letter, to support the concept of not using only the “best” analyst to run PTs.

Jerry will also follow up with WY and Alaska on behalf of Advocacy, and if there’s progress to report, will prepare an article for the newsletter.

Sharon has recruited some vendors for the Marketing and Outreach subcommittee and plans to schedule an initial conference call for this group in early fall.

TNI will host a half-day workshop at the next FSEA meeting, about the new TNI standard. Speakers are identified for the four “major” modules of Volume 1, with Jerry moderating. Steve noted that as the current Vice President of FSEA, he will be present.

## 7. Next meeting

The next regular meeting will be Thursday, September 1 at 12 Noon Central time. An agenda and documents will be sent by email.

## Attachment 1

	<b>Name</b>	<b>Stakeholder Group</b>	<b>Present/Absent</b>
1.	Lara Phelps	EPA (Other)	Present
2.	Steve Arms (Chair)	Other	Present
3.	Lynn Bradley	Other	Present
4.	Stephanie Drier	Lab	Absent
5.	Martina McGarvey	AB	Present
6.	Stacie Metzler	Lab	Absent
7.	Zonetta English	Lab	Present
8.	Marlene Moore	Other and NEFAP	Absent
9.	Elizabeth Turner	Small Lab Advocate	Absent
10.	Gary Ward	AB	Absent
11.	Janice Willey	Federal	Absent
12.	Trinity O'Neal	Lab	Absent
13.	Robin Cook	Lab	Absent
	<b>Associate Members</b>		
	Kirstin Daigle	Lab	Absent
	Judy Morgan	Lab	Absent
	Aurora Shields	Lab	Absent
	JoAnn Boyd	Lab and FAC	Absent
	Judy Duncan	Other	Absent
	Kenneth Jackson	Other	Absent
	Keith Chapman	Other	Absent
	Sharon Mertens	TNI Board Past Chair	Absent
	Teresa Coins	TNI Ambassador	Absent
	Andrea Teal	TNI Ambassador	Absent
	Devon Morgan	TNI Ambassador	Absent
	Bob Pullano	TNI Ambassador	Absent
	Lee Wolf	TNI Ambassador	Absent
	Paul Junio	TNI Ambassador	Absent
	<b>Staff</b>		
	Jerry Parr	TNI ED	Present
	Carol Batterton	TNI PA	Absent
	<b>Guests Present</b>		
	William Daystrom	TNI Webmaster	
	Kristin Brown	AB	
	Jessica Gensen	Lab	
	Donna Ringel	EPA R2	
	Alfredo Sotomayor	TNI Board Chair	

## Attachment 2

### PowerPoint Presentation from Advocacy Committee Meeting at Conference

- Advocacy Committee
- Steve Arms, Chair
- August 12, 2016

#### Mission

- The Advocacy Committee is charged with promoting the efforts of TNI nationally.

#### Advocacy's Role

- Establish relationships with other organizations (e.g., ACIL, AWWA, WEF) that have an interest in accreditation issues.
- Establish relationships with EPA program offices.
- Develop presentations and papers to promote national accreditation.
- Develop presentations and papers to promote TNI.
- Provide outreach at national, regional and local meetings.
- Assist with publication of the *Institute Review*.
- Support conference planning

#### Membership

- Steve Arms
- Lynn Bradley
- Robin Cook
- Stephanie Drier
- Zonetta English
- Martina McGarvey
- Sharon Mertens
- Stacie Metzler
- Marlene Moore
- Trinity O'Neal
- Lara Phelps
- Elizabeth Turner
- Gary Ward
- Janice Willey

#### Associate Members

- JoAnn Boyd
- Keith Chapman
- Kirstin Daigle
- Judy Duncan
- Kenneth Jackson
- Judy Morgan
- Aurora Shields
- Teresa Coins
- Andrea Teal
- Devon Morgan
- Bob Pullano
- Lee Wolf
- Paul Junio
- **Staff**
- Carol Batterton

- Jerry Parr

#### Today's Agenda

- Highlights from the week
- Newsletter topics and planning
- Marketing and outreach report
- Strategic plan review
- FSEA workshop

#### Highlights from this Week

- Overview of significant issues raised at this meeting that may require action by the Advocacy Committee

#### Newsletter Planning

- Fall Newsletter
  - Editor: Robin Cook
  - Articles due: October 15?
  - Publication: November 1 ?
- Topics and assignments
- Editors
  - Winter: Trinity O'Neal
  - Spring/summer: ?????

#### Marketing and Outreach Subcommittee Report

- Proposed Mission – Brand TNI as the resource for all activities related to generating environmental measurement data*
- Organizing members – Sharon Mertens, Jerry Parr, Zonetta English*

#### Marketing and Outreach

##### Proposed Focus

- Develop long range plan for marketing accreditation, TNI training*
- Identify opportunities for promotion*
- Central repository of information on current TNI marketing activities*
- Outreach to labs, EPA, ABs (NELAP, NGAB, non-NELAP)*
- Coordination, review of marketing activities – not necessarily doing all of them*

#### Marketing and Outreach

##### Status at OC

- Organizing committee*
- Getting ideas from vendors and other marketing professionals*
- Regular conference calls planned to start in fall*

#### Strategic Plan Review

- Goal 1.1 Ensure that TNI accreditation standards are used universally and are developed or revised as needed in an efficient process.**
- Objective:** Have all states use the TNI standard for accreditation.
  - Ongoing outreach efforts encourage states to incorporate TNI standards into their accreditation/certification programs

#### Strategic Plan Review

- Goal 2.1 Enable and encourage stakeholders to participate in the activities of TNI by providing assistance and incentives.**
- Objective:** Provide routine communications/information to TNI members.

- On-going communications through the newsletter Completion of both the generic application and the upgraded access to the compendium of methods

#### Strategic Plan Review

- Develop better systems to encourage members to vote on standards.
- Voting on standards is encouraged by changes in the standards development process, and by providing webinars to discuss changes at the onset of voting for individual module revisions
- Improve the system for encouraging volunteers to become involved in TNI activities and ensure a pool of volunteers is available for committees
  - The new member reception in Tulsa was promising. Additional improvement for encouraging volunteers still needed

#### Strategic Plan Review

- **Goal 2.2 Promote the benefits of accreditation to stakeholders, advocate for stronger support of accreditation from data users, and persuade data users to make accreditation mandatory.**
- **Objective:** Develop a long range plan for promoting and marketing accreditation to data users
- Form Marketing and Outreach subcommittee under the Advocacy Committee to identify opportunities to promote TNI.
  - Marketing subcommittee established

#### Strategic Plan Review

- Develop a “State of National Accreditation” report every two years and offer briefings to EPA Regional Science and Technology Directors and Forum on Environmental Measurement.
  - The “State of National Accreditation” report was completed and distributed as a seven-page letter to the EPA Forum on Environmental Measurements. Steve, Jerry and Carol will update and re-distribute it once the change of administration occurs at EPA.

#### Strategic Plan Review

- Share the “State of National Accreditation” briefing noted above to assessors
  - The report has been shared with the state assessor group
- Expand outreach to non-NELAP states
- Assign a TNI ambassador to every non-NELAP state, identify current barriers.
  - The TNI ambassador pilot program is underway and additional state ambassadors will be identified
  - Ambassadors have been incorporated into the Advocacy Committee as associate members
  - Strategic Plan Review
  - Offer one free, non-voting membership to the certification manager or his/her designee of every non-NELAP state.
    - The free non-voting membership needs to be reconsidered in light of current state memberships and likely state regulations about accepting gifts
  - Develop and offer a free webinar to introduce TNI and highlight the benefits of recognition, to expand communication on the TNI standard as the ‘gold standard,’ and to explain what NELAP is today
    - The webinar was produced and presented and is available on the website. This will be turned into a handout version for easy use by ambassadors.

#### Strategic Plan Review

- Work with the EPA Office of Water to ensure that the TNI laboratory accreditation standard is deemed “equally effective” to the Drinking Water Certification Manual (DWCM).
- Monitor changes to the DWCM.
  - TNI met with EPA OW this week to continue discussion of criteria for evaluating equal effectiveness of state certification programs and NELAP ABs. This is timely as EPA is reviewing its certification program and updating its Certification Manual, at the same time as TNI is updating its procedures for evaluating NELAP ABs.

#### Strategic Plan Review

- Develop a document that summarizes the differences and similarities of the TNI and EPA Drinking Water programs. (Distill down from the crosswalk).
  - State regulations are all structured differently so that such a comparison would take near-endless amounts of time for small benefit. Probably will not pursue this activity.

#### Strategic Plan Review

- Meet periodically with EPA program offices (e.g., Air, Solid Waste, and Wastewater), other federal agencies, state agencies, trade associations, other data users, and FSMOs to promote TNI and to better understand their needs for reliable environmental data and work to ensure the TNI program meets the needs of all data users.
  - Meetings with EPA program offices should be delayed until the change of administrations nears completion.

#### Strategic Plan Review

- Promote EPA laboratory competency policy required for grants, EPA cooperative agreements, and contracts and show how TNI’s accreditation programs are an effective way to demonstrate compliance with this policy.
  - Will be incorporated into the Marketing and Outreach subcommittee efforts

#### Strategic Plan Review

- Effectively use the Small Laboratory Advocacy Group (SLAG) to engage small laboratories and to disseminate information to small laboratories.
  - The Small Lab Advocacy Group now uses LinkedIn as its forum; SLAG will become engaged with the Marketing and Outreach subcommittee to add support to the effort.
- Consistently have a seminar at NEMC to introduce newly accredited laboratories to TNI
  - Will be incorporated into the Marketing and Outreach subcommittee efforts

#### Strategic Plan Review

- **Goal 2.4 Provide conferences that are beneficial to the environmental community, enhance TNI’s mission, and contribute resources to support TNI’s programs.**
- **Objective:** Continue to hold a semi-annual Forum on Laboratory Accreditation.
  - The semi-annual Forum continues, and is the venue for the TNI annual meeting. With electronic communications becoming increasingly easy, TNI will eventually re-evaluate the need for two meetings per year, but not yet.

#### Strategic Plan Review

- Explore opportunities for working cooperatively with other organizations to hold other regional conferences and workshops.

- TNI has pursued expanded opportunities to participate in regional laboratory and water utility meetings

#### FSEA Workshop on TNI Standards

- Half-day workshop on the 2016 TNI Standards
- Wednesday, October 26, 8:30 am to noon
- Wyndham Grand Jupiter at Harbourside Place, 122 Soundings Avenue, Jupiter, FL 33477
- How to structure?
- Potential speakers?

#### Next Meeting

- Next regular Advocacy Committee meeting is September 1 at 12 Noon Central time