

The NELAC Institute
On-Site Assessment Committee Meeting
March 9, 2007: 11:00 A. M. – 12:25 P.M.

Minutes

Attendance and Minutes of previous meeting:

Myron Getman
Nilda Cox
Don Cassano
Denise Rice
Elizabeth Ziomek
Mark Mensik
John Gumper
Faust Parker

Myron Getman is an associate member who was invited to attend because the committee lacks expertise in asbestos.

The committee approved the minutes from the last teleconference.

Discussion about Vice-chair

There was some discussion about who the vice-chair should be and how long the term is. The discussion was shelved until the chair can get an answer from the Board about term length.

The committee was reminded that the Board needs their applications. So far only Nilda, Faust and Margo have submitted theirs to the chair.

New Charter – See Attachment A

The committee reviewed the current charter section by section and revised/updated. Nilda Cox suggested that we add the development of the revised curricula and assessor manual to the success measures section. Ms. Cox also said we should ask Alfredo about what was done with field activities with regard to one of the charter measures. The chair will contact the committee to see if they think the on-site assessment module applies to them. The chair will add the suggestions to the charter and send it with the minutes to the committee. The charter will be approved/disapproved by e-mail for the benefit of those who were not in attendance.

The Surveys - lab survey and assessor survey

Mark Mensik stated that there were two surveys, one for labs participating in NELAC audits and one for assessors of accrediting authorities. The surveys were supposed to be a way to determine consistency and improve the assessment process. Faust Parker, Alfredo Sotomayor and Mark worked on the surveys. The committee discussed who should get the assessor survey. The

committee thinks that any state that does NELAP type assessments or has adopted NELAP standards should be included. Because all states that support NELAP are not accrediting authorities, such as Nevada and Wisconsin, all states that support NELAP by inclusion of standards or NELAP type assessments should be included. The survey questions were completed but never sent out. Mr. Mensik found and e-mailed the assessor survey. Denise Rice stated that she might like to add a few questions since we were going to go through the trouble of doing a survey, we should gather a little information on some burning issues. Margo Hunt, by e-mail 03/14/07 informed the committee that she was the originator of the survey idea and helped with its development. She also believes that one of the surveys was actually taken by another committee – Quality Systems. The chair will follow up with Quality Systems to see if they did take a survey.

Project Work: Develop curricula of technical courses for assessors – See Attachment B

- The committee reviewed the current requirements for technical courses as given in the On-site Appendix B of the 2003 NELAC standard
 - It was suggested that to the general course content section we add calibration techniques and calculations or perhaps this could be put under essential elements
 - Ms Cox suggested that we look at the drinking water certification course to see if we are consistent with it. Mr. Cassano said that NYS is interested in the drinking water certification course because they use these as primary training for assessors. Ms. Rice stated that the courses don't adequately cover inappropriate techniques.
 - Ms. Ziomek said that in the technical courses she has taken, there is no instruction on the method. Marlene Moore's courses deal with auditing to the standard not the method. Her courses are strictly quality systems. The courses need to be a blend of quality systems and method specificity and how to mesh the two.

- The committee decided to develop curricula for each major discipline. The table below describes which disciplines will be covered, who will develop the initial skeleton for the committee (based on expertise or access to it) to discuss and the tentative meeting during which it will be discussed.

Discipline	Parties Developing	Tentative date of discussion
Microbiology	Margo, John	April 6, 2007
Inorganic non-metals	Mark, John, Nilda	April 6, 2007
Metals	Betsy, John	April 20, 2007
Organics	Denise, John	April 20, 2007
Toxicity	Faust	May 4, 2007
Asbestos	Myron, Laurie	May 18, 2007
Radiochemistry	Mark, Nilda	May 18, 2007
Field Activities	TBD	June 21, 2007

There was a discussion about including manual integration in the training and if we should tackle writing a manual integration SOP. It was mentioned that the State Assessors group will write a protocol for manual integration. Mr. Cassano asked if we could adopt that. Ms. Rice said it would be possible since this is guidance not a standard. Mr. Gumpfer wished to know how the calibration protocol was distributed. The calibration protocol will be given to the state assessors. The ability to comment on the procedures was limited to assessors. Once released, the assessors will see who is using the guidelines and who doesn't as a way of determining the success of the guidance. Mr. Gumpfer wanted to make sure that more than just state assessors get input if our committee is going to use it or the manual integration document.

The meeting adjourned at 12:22 PM

Attachment A

COMMITTEE CHARTER

1. Committee Name: TNI On-Site Assessment	2. Version: 3	3. Date: March 9, 2007
<p>4. Mission Statement: The On-Site Assessment Committee establishes standards, processes, and guidance for planning, conducting, reporting, and evaluating assessments performed at the operating locations of bodies involved in analyzing and sampling environmental samples. The On-Site Assessment Committee:</p> <ul style="list-style-type: none"> • Generates procedures for conducting and documenting on-site assessments of laboratories, environmental sampling and testing organizations, and other entities interested in environmental measurements. • Specifies the minimum education, training, and experience requirements for assessors, and the frequency of on-site assessments. • Promotes and facilitates communication between assessors, those assessed, and other interested parties. • Develops and evaluates assessor training courses. • Develops a manual for assessors on conducting assessments and writing subsequent reports 		
<p>5. Committee Sponsor: INELA Board of Directors</p>		
<p>6. Committee Members: <i>(indicate Chairperson, insert rows as necessary for additional members)</i></p>		<p>7. Interest Category & Stakeholder Group:</p>
Denise Rice, Chair		Federal Agency, EPA. Office of the Inspector General
Donald Cassano		State Agency (NELAP); New York State Dept. of Health
Nilda Cox		Laboratory, MWH Laboratories
Margo Hunt		Federal Agency; EPA Office of Environmental Information Quality
Mark Mensik		Other Interests (Consultant); Analytical Quality Associates
John Gumpfer		Other Interests (Consultant); Chemval
Faust R. Parker, Jr.		Laboratory; PBS&J Environmental Toxicology Laboratory
Elizabeth Ziomek		State agency; Virginia DEQ
<p>8. Objectives: <i>(insert rows as necessary for additional objectives)</i></p>		
<p>✓ Develop a standard module for the on-site assessment by accreditation bodies of environmental laboratories.</p>		
<p>✓ Help develop a guidance document for laboratories subject to on-site assessment by accreditation bodies.</p>		
<p>✓ Conduct a survey of laboratories regarding the state of on-site assessments.</p>		
<p>✓ Conduct a survey of assessors regarding the state of on-site assessments.</p>		
<p>✓ Collaborate with the Accreditation Body Committee in producing a standard module for Accreditation Bodies.</p>		
<p>9. Success Measures:</p> <ul style="list-style-type: none"> • The On-Site Assessment Module for Accreditation Body Volume will be endorsed by the TNI membership. • The Committee will produce a survey for laboratories that will be returned by at least 25% of those receiving it. • The Committee will produce a survey for assessors that will be returned by at least 25% of those receiving it. • Revised curricula of assessor and technical training • Development of a manual for assessors 		

<p>10. Key Milestones: <i>(significant events and corresponding dates)</i> TBD</p>
<p>11. Considerations: <i>(assumptions/constraints/obstacles/risks)</i></p> <ul style="list-style-type: none"> A. The Standard TNI will produce will find a suitable audience and market. A. The Standard TNI will produce will be much easier to use by the existing regulator and regulated community. A. The proposed laboratory survey will offer an accurate portrait of the state of on-site assessments. A. The proposed assessor survey will offer an accurate portrait of the state of accredited laboratories. R. The resulting TNI Standard will not be adaptable by existing accreditation bodies. R. The cost of using ISO Standards collectively or selectively by TNI will discourage potential members.
<p>12. Available Resources</p> <ul style="list-style-type: none"> • Volunteer committee members. • A potential large group of volunteer associate members to help with committee objectives. • Benefits from ANSI recognition. • Existing cooperative agreement with EPA.
<p>13. Additional Resources Required:</p> <ul style="list-style-type: none"> • Members to complete and balance the interest groups of the committee. • Electronic service to conduct and evaluate results of laboratory and assessors survey. • Support and guidance with the logistics of conducting committee meetings, evaluating stakeholder input, and officially recording committee decisions. • Experts from environmental sampling, testing and regulating organizations willing to help craft guidance documents
<p>14. Anticipated Meeting Schedule: <i>(specify meeting format and frequency)</i> Meetings will be scheduled once or twice per month, with an option of increasing or reducing their frequency as needed to meet the objectives. The On-Site Assessment Committee meetings will be open to all associate members. Meetings will be conducted by the chair following an agenda distributed to members and interested associates before the meeting.</p>

Attachment B

Appendix B - TECHNICAL TRAINING COURSES FOR ASSESSORS

B.1 INTRODUCTION

The purpose of the technical training courses is to ensure consistency of technical knowledge among the NELAC assessors. Prerequisites for the training course for the assessor are:

1. Basic knowledge of the technology, i.e. familiarity with the principles and application of the technology used by the laboratory.
2. An understanding of Quality Systems.

The technical courses must concentrate on the elements and details of the technology and/or methods that are critical to assuring that the laboratory is implementing it or them properly. Technical training courses provided to meet the requirements defined in Section 3.2.3 of the NELAC Standard must address the elements listed below. Assessor technical training courses must also focus on how to review these elements during the on-site assessment. The skills obtained during these training courses must also enable assessors to evaluate quality systems components present in the laboratory, as they relate to technical disciplines, to ensure compliance with the NELAC Standard.

B.2 COURSE CONTENT

Technical training courses must provide, identify, or review:

- Basic theoretical and operating principles of the analytical technology and associated instrumentation and software.
- Critical steps and processes of the analytical technology or technique that must be executed to
- ensure quality data, including critical quality control (QC) measures and QC criteria based on the technology.
- Major sources of error, and how to control them, for the analytical technology or technique.
- Inappropriate procedures or practices for the analytical technology or technique.
- Key information required to document completely the reported results.
- Essential elements for assessing data generated.
- Ways to detect improper practices.
- Exercises in the evaluation of raw data to reported results.

The training course must also include an examination covering the material presented to ensure an understanding of the above elements. Results of the examination will be submitted to the accrediting authority for action. All attendees will receive a course certificate.

B.3 COURSE OBJECTIVES

The assessors successfully completing the course shall have acquired the following:

1. Knowledge sufficient to assess the implementation of the technology by the laboratory.
2. An understanding as to how the technology is used in the various methods.
3. An understanding of the key elements of data packages, and raw data to review and check effectively.