



<b>SOP TITLE:</b>	<b>Educational Delivery System</b>
<b>SOP NO.:</b>	<b>1-110</b> <b>Numerical Designator:</b> 1 = Administrative and Support Procedures 2 = Consensus Standards Development Program (CSDP) 3 = National Environmental Laboratory Accreditation Program (NELAP) 4 = Proficiency Testing Program (PTP) 5 = National Environmental Field Activities Program (NEFAP)
<b>REVISION NO:</b>	<b>0</b>

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## **1.0 Purpose and Applicability**

This SOP describes the components to TNI's Educational Delivery System and provides procedures for development, review and acceptance, renewal and establishment of fees for trainings. The procedures are relevant to both TNI and third party developed training.

## **2.0 Summary**

TNI's Educational Delivery System is a comprehensive training system that utilizes various face-to-face and web based types of training. Training courses, workshops, forums, seminars and on-demand education materials are developed by TNI and training providers. The material is reviewed and approved by TNI and then made available to TNI members and the environmental community.

## **3.0 Related Documents**

Policy 1-101, Conflicts of Interest.

## **4.0 Definitions**

- 4.1 Educational Delivery System (EDS): TNI's training system that encompasses the various types of training defined in Section 4 – on-site, webinar and self-paced training courses, workshops, forums, seminars and other on-demand education material.
- 4.2 Training Course: A course with a structured training format. There is a defined scope and objectives, it is taught by knowledgeable instructor(s) and the learner's progress is evaluated at the end of the training. The course may be taught in person as well as at a distance.
- 4.3 Workshop: A meeting where people work together to improve their skills in a particular area. A workshop might include presentation, discussion and practical exercises. It is less formal than a training course.
- 4.4 Forum: A meeting where people come together to discuss a predetermined topic. Forums have a moderator or facilitator who ensures the discussion stays on topic.
- 4.5 Seminar: In person lectures given by an expert in a particular topic. They are intended to give the attendee additional knowledge in the topic area and give an opportunity for questions and answers.
- 4.6 Webinars: Real time interactive on-line training courses, workshops, forums or seminars. They are set-up for a specific audience at a specific time and allow for interaction among the attendees.
- 4.7 Webcasts: On-line material that can be accessed anytime and generally by anyone who is interested. A webcast can be a pre-recorded training course, workshop, forum or seminar.
- 4.8 On-Demand Education: Learners can access educational information at anytime. This material might include webcasts, self-paced training programs, PowerPoint presentations, etc.
- 4.9 Self-Paced Training: Computer or web based training that can be used at the user's preferred pace. If it is a training course there is usually a time frame that the course must be completed in to receive a certificate of completion or credit. There may be interaction with the instructor by e-mail.

- 4.10 Continuing Education Units (CEU): CEU's measure "participation in organized continuing education/training experiences under responsible, qualified direction and instruction." The learner's progress must be evaluated and feedback must be given to the learner. The number of CEUs is the total number of learning hours divided by ten.

## 5.0 Procedures

### 5.1 Organization

5.1.1 In TNI, Administration and Support consists of the TNI Board of Directors, a number of committees that work across all TNI programs, and TNI staff. These groups and individuals provide the overall direction and management of TNI as well as ensuring an infrastructure to support core programs. TNI's Educational Delivery System (EDS) is part of Administration and Support.

5.1.2 The Educational Delivery System is staff supported through a Training Coordinator.

#### 5.1.2.1 The Training Coordinator

- Develops a training curriculum consistent with TNI's strategic plan;
- Maintains a master schedule of training events and assists as needed with registration and marketing needs;
- Provides input on optional training mechanisms available for training;
- Works with TNI's IT Administrator to provide a website for the Educational Delivery System; and
- Works with TNI committees and training providers to establish a comprehensive offering of training courses and workshops.

5.1.3 Each program in TNI has a committee designated with the responsibility to evaluate the training needs of the program and its users. This committee may also develop training material, work with other TNI committees developing training materials or work with training providers.

5.1.3.1 The designated committee may be a committee established to specifically handle training (e.g., Laboratory Technical Assistance Committee (TAC)) or may be an established committee that has taken on the responsibility for training in addition to other responsibilities (e.g., Field Activities Committee (FAC) in NEFAP).

5.1.3.2 The Training Coordinator attends designated committee meetings when training related topics are on the agenda. This allows the Training Coordinator to stay abreast of training needs and events, and provide input on various training options. It also builds consistency in training across TNI.

5.1.3.3 Each designated committee should establish their own internal process for review of training materials.

### 5.2 Types of Training

5.2.1 TNI's Educational Delivery System (EDS) consists of different types of training using a number of different training delivery options. Section 4 defines these options.

5.2.2 Training may be developed by TNI through the help of committees or through contracts with training providers or through a partnership with training providers who maintain ownership of their training material.

5.2.2.1 When training providers are developing training material with TNI, it must be clearly documented up front who has ownership of the material.

5.2.2.2 All developed training must go through the review process described in 5.3.

### 5.2.3 Training provided by others

5.2.3.1 TNI may request training for a specific training topic through a Request for Proposal mechanism. Such RFPs identify the scope of the training and terms of payment. In some cases these courses are developed for a set fee and TNI maintains ownership of the material and in other cases the RFP may give the provider the option to develop and own the material and TNI receives a percentage of the course fee that is established through an agreement between TNI and the provider. TNI will handle marketing and registration for the course. TNI will also provide course feedback surveys.

Note: A training provider may submit an unsolicited proposal for a TNI training event. It will be handled similar to the procedures identified above. TNI is under no obligation to consider such a proposal.

5.2.3.2 As part of TNI's Educational Delivery System, a portion of the website will be dedicated to training a provider feels would be useful to TNI members or the environmental testing community. The provider has the option to simply post the course with a link on the site or additionally, TNI can provide registration services for the course and web based course assistance. These options may have fees associated with them.

## 5.3 Review and Acceptance of Developed Training

All trainings offered through TNI's Educational Delivery System must be reviewed. A TNI logo can only be used on TNI approved training.

Note 1: When considering forums and seminars, only the topics need to be communicated to the Training Coordinator. A formal review process is not developed.

Note 2: TNI reserves the right to reject any unsolicited proposal for training without review.

### 5.3.1 Training Developed by TNI

When training is developed by TNI that TNI will own, a review process must be determined by the committee developing the material and TNI's Training Coordinator.

5.3.1.1 At a minimum, the following must be considered in the review:

- Type of training: Training Course, Workshop, Seminar, On-Demand Educational Material.
- Delivery Format
- Intended Audience
- If face-to-face – General Location for Training
- Detailed Outline
- Final Review to Ensure Content is Consistent with Outline

### 5.3.2 Training Developed by Training Providers that Provider Owns

A review process has been established for review of training courses that are owned by the provider.

5.3.2.1 An on-line application must be completed with an attached detailed outline of the training being proposed (see Attachment A). The application requests information on the reason for the submission, type of training, training delivery method, intended audience, requests for use of a TNI logo on the training material and requests for additional TNI services such as registration, web based training services, etc.

5.3.2.2 The TNI Training Coordinator determines the appropriate committee(s) or group of individuals for review. The Training Coordinator shall be sensitive to potential conflicts of interest when making this determination and shall discuss it with the provider prior to submission for review. All reviewers of the training documentation must sign a Confidentiality Agreement (see Attachment B) before they can receive any documentation regarding the proposed training. The committee(s) or group will review the application and outline and must provide a recommendation to the Training Coordinator for acceptance or rejection of the proposal. They can also provide feedback to the provider regarding their decision. The Training Coordinator will communicate the status of the application back to the provider.

5.3.2.3 The final course material may be reviewed by the TNI Training Coordinator or another TNI staff member to ensure the material is consistent with the outline.

5.3.2.4 A contract will be prepared for every training event provided by a Provider in cooperation with TNI. The contract will spell out any financial agreements as well as address ownership of materials.

## 5.4 Registration

5.4.1 Events that require registration assistance are coordinated by TNI's Training Coordinator. Registration is provided on-line or by phone, fax or mailing. Registration reminders are distributed to all training attendees where an e-mail address is provided.

## 5.5 Fees

5.5.2 Training fees may be established for any type of training.

5.5.2.1 TNI's Finance Committee approves a general fee schedule for similar types of TNI developed training. If a different fee is proposed, it must be approved by TNI's Finance Committee.

5.5.2.2 Fees for training provided by training providers in partnership with TNI are determined by the trainer and require no approval by TNI.

5.5.3 Fees for posting of courses on the TNI website and use of additional TNI training services are determined by the TNI's Finance Committee.

## 5.6 Expiration and Renewal

- 5.6.1 Trainings are approved for one year from the date of acceptance unless either TNI or a training provider is made aware of new regulations or standard requirements that make the training material inaccurate.
  - 5.6.1.1 If the material becomes inaccurate, the provider of the training material must provide an update to the material or withdraw the training. Minor changes can be updated without charge, but extensive changes may require a new application and fee. This will be determined by TNI.
  - 5.6.1.2 Written requests for a longer approval time frame can be made to the Training Coordinator and are considered on a case-by-case basis depending on the type of training material and the reason for the extension.
- 5.6.2 A renewal application will be distributed, as appropriate, within two months prior to expiration of the approved training. Fees for renewal are outlined in the application.

## 6.0 References

None

## 7.0 SOP Approved Changes

Prev. SOP No.	New SOP No.	Date of Change	Description of Change
N/A	10-110 Rev 0	NA	New Document.

Attachment A.

On-line Training Application

### **Proposal/Application to Provide Training**

An overview of TNI's training program can be found in [SOP 1-110](#) - TNI Training: Educational Delivery System (*Setup as link to view SOP*). Information in this document will help you complete this application. Contact Ilona Taunton with any questions ([ilona.taunton@nelac-institute.org](mailto:ilona.taunton@nelac-institute.org)) (*link to e-mail address*).

*Note: This is a preliminary application process. You may be contacted for additional information prior to finalizing any training.*

Reason Application Submitted:

- In Response to TNI RFP
- Training Proposal
- Request Training be Added to TNI Website

Name:

Company:

Address:

E-mail:

Phone:

Best Time to Contact You:

Describe the training you are proposing. Include information about location (if onsite) and date(s) if known.

Who is the intended audience?

Expected benefit of training?

Who will perform the training (names of trainers)?

What type of training format(s) are you proposing:

- Workshop
- Forum
- Seminar
- Webinar
- Webcast
- On-Demand Education
- Self-Paced Training
- Other: \_\_\_\_\_

How much time is needed for the course (4 hours, 2 full days, ...)?

How would you like TNI to assist you in offering this training (select all that apply)?

- TNI internally developed training.
- Training contracted by TNI (response to RFP).
- Partnership where trainer has option to maintain ownership of training material. This may be an unsolicited proposal for TNI training.

Post training course with specified links on TNI training website. In addition:

- Handle registration and reminders for course.
- Provide on-line feedback survey to registered participants.
- Provide set-up for webinar course.
- Record course.
- Other:

Other:

Would you like to place the TNI logo on the training material?  Yes  No

Who will own the training material?

A copy of the course outline and a synopsis is required prior to final approval of this application. This comprehensive outline and synopsis will be reviewed confidentially to respect the trainer's material. All reviewers must agree to a written Confidentiality Agreement before they are able to view the outline and any additional training material. TNI retains the right to request modifications, additions or deletions to course outlines prior to acceptance of the application.

Outline & Synopsis Attached  Outline & Synopsis Will Be Provided By       (date)      .

Upon approval of this application, a written agreement summarizing the terms of the training will be provided to the trainer. Further information may be requested in order to prepare this agreement.

Application Completed By:

Date:

Attachment B

Example Confidentiality Agreement

This training material is being distributed to you (Reviewer) as controlled documents for review and comment. Prior to receiving access to this information you must agree to the terms of the following Confidentiality Agreement. Once you agree, the document(s) for review will be made available. Contact Ilona Taunton ([ilona.taunton@nelac-institute.org](mailto:ilona.taunton@nelac-institute.org)) with any questions regarding this requirement.

Confidentiality Agreement

This Confidentiality Agreement ("Agreement") is made between The NELAC Institute (TNI) and the Reviewer of any training material the Reviewer is requested to review by TNI. This agreement is in effect from the time it is accepted by the reviewer, until 2 years later except with the specific prior written authorization by TNI.

The Reviewer agrees that the training material provided is to be considered confidential and proprietary to the owner of the material and shall hold the material in confidence and shall not use it for any purpose other than for review and comment. The Reviewer shall not disclose, publish or otherwise reveal any of the confidential material. The material provided for review shall not be printed or duplicated by the reviewer except for purpose of reviewing the material. The material shall not be distributed in anyway other than to the intended party it was specifically distributed to (the Reviewer). Violation of this agreement will be considered a breach of the TNI Membership Code of Ethics and action may be taken by the TNI Board of Directors.

The Reviewer shall have no obligation under this agreement with respect to confidential information which is or becomes publicly available.

The Reviewer agrees to the terms of this agreement by clicking on the "Agree" text below.

Agree      Disagree