



<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>1.1</b>

<b>Committee:</b>	Staff	<b>Approved Date:</b>	03/05/17
<b>Program Executive Committee:</b>	n/a	<b>Approved Date:</b>	NA
<b>Policy Committee Reviewed Date:</b>			03/03/17
<b>TNI Board of Directors Endorsed Date:</b>			3/8/17
<b>SOP Effective Date:</b>			03/05/17

## 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  
SOP 1-117, Continuing Education Units

## 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 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.

#### 4.10 Training Categories:

- **Laboratory:** Education in
  - the theory and techniques of any environmental analysis;
  - the TNI Environmental Laboratory Sector Volumes 1-4 and any related technical or general evaluator or assessor training; and
  - laboratory related regulations and topics.
- **Field Sampling and Measurement:** Education in
  - the theory and technique of environmental sampling and/or field measurements,
  - the TNI Field Sampling and Measurement Organization Sector Volume 1-2 and any related technical or general evaluator or assessor training; and
  - field related regulations and topics.
- **TNI:** Courses related to TNI such as Board of Director training, use of LAMS, etc.
- **Other:** Courses that don't fall into the categories above.

## 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 and committee in TNI is a resource to determine training needs of TNI and its users. Committees may develop training material they submit to TNI using the online application. The TNI Training Coordinator may request that committees review related training material that has been submitted through the EDS.

### 5.2 Types of Training

5.2.1 TNI's 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.

## 5.3 Review and Acceptance of Developed Training

All trainings offered through TNI's EDS 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, the online application must be completed. The application requires a training outline, synopsis, etc. (see Attachment A) .

### 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 online 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, etc.

5.3.2.2 The training proposal is reviewed by the Training Coordinator and the TNI Executive Director to determine whether the proposal will be accepted for further review. In some cases, the Training Coordinator may seek additional input from TNI programs or committees in order to make a decision. In these cases, the TNI Coordinator will be sensitive to potential conflicts of interest and anyone providing input will have a Confidentiality Agreement (Attachment B) on file. The Training Coordinator will communicate the status of the application back to the provider.

5.3.2.3 The TNI Training Coordinator determines the appropriate level of review of course material. In some cases the material is only reviewed by the Training Coordinator or another TNI staff member and in other cases a committee(s) or group of individuals are requested to review the material. . 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.

5.3.2.4 The final course material may be reviewed to ensure the material is consistent with the outline.

5.3.2.5 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 Marketing

5.4.1 Once a proposal is approved, a Training Course Report (Attachment C) is completed to provide information to develop online registration and prepare a flyer for email marketing. This report is maintained in an access controlled online site (e.g., Dropbox) for easy access by TNI staff as needed.

5.4.2 Templates are numbered into the following categories defined in Section 4.10:

1. Laboratory
2. Field Sampling and Measurement
3. TNI
4. Other

5.4.3 Each Training Course Report is numbered by placing TR, a dash, the year, a dash, category number, a dash and then sequentially numbering the templates as they are received (e.g., TR-2017-1-3).

#### 5.5 Registration

5.5.1 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.

#### 5.6 Fees

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

5.6.2.1 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. Minor changes are approved by the TNI Executive Director with communication to TNI's Finance Committee and major changes must be approved by TNI's Finance Committee.

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

#### 5.7 Expiration and Renewal

5.7.1 Trainings are approved for three years 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.

5.7.1.1 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.

5.7.1.2 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.

5.7.2 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.

**5.8 Course Evaluation**

For all training courses provided by TNI, TNI will request attendees complete a course evaluation form. These forms will be used to evaluate the effectiveness of the instructor for providing additional classes.

**6.0 References**

None

**7.0 SOP Approved Changes**

Prev. SOP No.	New SOP No.	Date of Change	Description of Change
N/A	1-110 Rev 0	08/08/11	New Document.
1-110 Rev 0	1-110 Rev 1	02/23/17	Added training categories, procedures for use of Training Course Templates and course evaluation requirements. Updated procedures for training material reviews and handling training renewals. Removed Self Pace training, need for program training committees, advertising training provider courses offered outside of TNI, Update training application and confidentiality agreement.
1-110 Rev 1	1-110 Rev 1.1	03/05/17	Editorial changes made based on Policy Committee Review.

Attachment A.

Online 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

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)?

Trainer(s) Biography (if not on record with TNI already):

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

- Workshop  
 Forum  
 Seminar  
 Webinar  
 Webcast  
 On-Demand Education  
 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.

Other:

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

Who will own the training material?

Payment Proposal (if not TNI developed training):

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

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 and until TNI receives a written request to dissolve this agreement.

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

Attachment C

Training Course Report

TITLE	<b>Course Title</b>
NUMBER	TR-Year-Category-Sequential Number (Example: TR-2017-1-3)
TYPE	Type of Training (Example: Webinar, Webcast, etc.)
LENGTH	Length of Training (Example: 2 hours)
DATE	Date(s) of Course
TIME	Time for Course
LOCATION	Location (Example: Onsite location or N/A)
FEE	Webinar: \$____ for TNI members and \$____ for non-members; \$____ group rate Webcast: Same as webinar or \$____ for TNI members and \$____ for non-members; \$____ group rate  Note: An additional \$____ per person will be charged for anyone who desires a certificate of attendance (or completion).
REGISTRATION URL	iAttend
INSTRUCTOR	Name, Organization  Biography
SYNOPSIS	Synopsis of Class. Include Agenda where appropriate.
EXPECTED LEARNING OUTCOMES	Must be included for courses offering CEUs.
CATEGORY	See Section 4.10
CEUS	Calculate
<i>For Internal Use</i>	
INSTRUCTOR FEE	Fee is included in contract.