

Summary of the TNI Competency Task Force Meeting
Wednesday, September 22, 2021 1:00 pm Eastern

1. Welcome and Roll Call

Aaren welcomed everyone to the meeting. Attendance is recorded in Attachment 1. The minutes from August 25 were approved by acclamation.

2. Closing In on Revised TM/TD/SME Role and Qualifications Language

Since the previous meeting, the idea for a joint session at conference in San Antonio has emerged, for the Task Force to meet with TNI's Training Committee and Expert Committee Chairs to discuss both credentialing and the TM/TD/SME position. To this end, Jerry created several documents to explain pieces of this broader issue, all of which were attached to the meeting reminder as background. The Credentialing Subcommittee's members are either from the Task Force or the Training Committee, so everyone involved would already be included.

While it is premature to leap into the detailed listing of KSAs that could be used for training and credentialing for the TM/TD/SME position, that list did get created and was shared as background, along with a concept paper about credentialing for such a position, the full three-option white paper that was posted for conference attendees to accompany Aaren's presentation about the TM/TD activity, an updated version of Option 3 created since then, and as fyi only, the text of a vacancy announcement for a TM/TD hire that neatly lays out the different duties and responsibilities.

With those pieces as background, Aaren explained that she and Jerry have been corresponding with one of the AB representatives about Option 3, and reached the conclusion (with Task Force support) that neither Option 1 or 2 would be acceptable (which we already had heard from the NELAP AC), and that, with either a change of title to "Technical Expert" or a change of definition to "Technical Manager", the framework of Option 3 would be acceptable. As trying to change the definition of a term that's been in use for over two decades is unlikely to gain traction, we opted to use "Technical Expert", going forward, but essentially using the same definition as we previously used for SME.

There was some discussion about whether to remove or retain the language about experience commensurate with the size and scope of the laboratory. While the concept sounds quite rational and the words are in fact used in the Drinking Water Certification Manual, the NELAP AC members have expressed concern that assessors will insert their personal expectations for "commensurate" and that even a PhD with no analytical lab experience will never be qualified to step into the Technical Expert role, fresh out of school. Still, for a lab performing only "simple" tests, far less experience and education are actually needed than for a full service lab. Jerry agreed to craft specific wording applicable to "simple" microbiology tests for §5.2.6.1.c (and has done so).

The issue of wording in California's regulations implementing the modified 2016 TNI Standard arose again, as those regulations very specifically use the term, Technical Manager and have an explicit definition for that individual in the lab. All we can offer is that the 2016 Standard will not be changed, but rather our intent is that the next iteration of the TNI Standard (whenever that takes place, sometime in the next several years) will incorporate the concept that the Task Force is crafting, and the full implementation of that final standard would be one or more years beyond the time it is designated as final and approved.

Since the Task Force meeting's end, Option 3 has undergone several iterations, and the language defining "simple" tests for microbiology far better clarified. The current version (see Attachment 2 below, and also attached to the email distributing these minutes) will be presented

to the NELAP Accreditation Council at its October meeting, in hopes of gaining full acceptance there so that this updated concept can be handed off to Quality Systems Expert Committee for inclusion in the next revision of V1M2 (with wordsmithing as that committee deems appropriate).

3. New Business

None.

4. Next Meeting

The next meeting of the Competency Task Force will be on **October 27, 2021, at 1 pm Eastern.** An agenda and any necessary documents will be sent in advance of the meeting.

The November meeting is rescheduled for December 1, at 1 pm Eastern. The regularly scheduled December 22 meeting date is not cancelled, as it may be needed to prepare for the planned joint session with one or more expert committees at conference in mid-January.

Attachment 1

Competency Task Force Roster

NAME		EMAIL	AFFILIATION	Present?	
Aaren	Alger	aaren@alger-consulting.com	Alger Consulting & Tech.	Yes	1
Paul	Banfer	paul.banfer@eisc.net	EISC	Yes	2
Kenneth	Brown	kbrown@escondido.org	City of Escondido	Yes	3
Julia	Caprio	JKlensCaprio@Geosyntec.com	Geosyntec	No	4
Patricia	Carvajal	pmcarvajal@sara-tx.org	San Antonio River Authority	Yes	5
Yumi	Creason	ycreason@pa.gov	Pennsylvania DEP	Yes	6
Kirstin	Daigle	Kirstin.daigle@pacelabs.com	Pace Laboratories	No	7
Steve	Drielak	drielak-associates@usa.net	Drielak & Associates	Yes	8
Amanda	Dutko	adutko@fairwaylaboratories.com	Fairway Laboratories	No	9
Stacey	Fry	sfry@babcocklabs.com	Babcock Laboratories	Yes	10
Kitty	Kong	Kitty.Kong@chevron.com	Chevron	No	11
Kimberly	Kostzer	kkostzer@coca-cola.com	Coca-Cola	No	12
Silky	Labie	elcatllc@centurylink.net	ELCAT	No	13
Harold	Longbaugh	Harold.Longbaugh@houston.tx.gov	City of Houston	Yes	14
Mike	Michaud	Mike.michaud@abilenetx.gov	City of Abilene	No	15
Mitzi	Miller	Mitzi.Miller@nv5.com	NV5	No	16
Jerry	Parr	jerry.parr@nelac-institute.org	The NELAC Institute	Yes	17
Sharon	Robinson	Sharon.Robinson@doh.nj.gov	New Jersey DOH	No	18
Joann	Slavin	Joann.slavin@health.ny.gov	NY ELAP	No	19
Alfredo	Sotomayor	asotomayor@mmsd.com	MMSD	Yes	20
Elizabeth	Turner	Elizabeth.turner@pacelabs.com	Pace Labs, Inc.	No	21
Associate Members (for TM/TD activities):					
Debbie	Bond	DBOND@southernco.com	Alabama Power	Yes	22
Michelle	Wade	mwade@a2lawpt.org	A2LA Workplace Training	No	23
Program Administrator:					
Lynn	Bradley	The NELAC Institute	Lynn.bradley@nelac-institute.org	Yes	

Attachment 2

Language in Optional Proposal 3 – Version 5, September 27, 2021

4.1.7.2 The laboratory's technical expert(s), however named (e.g., Technical Manager, Technical Director, Technical Specialist, Group Leader, Supervisor, Lead Analyst, Department Head) shall:

- a) be an individual with education and experience as specified in Section 5.2.6.1 This individual must have detailed knowledge and experience in the fundamentals of each test he/she is responsible for and at least a working knowledge of relevant quality system requirements in the TNI Standard. This individual may have supervisory responsibilities, but this is not required. This individual may also act as a resource to assure that data generated are fit for the purpose required by the client.
- b) serve as the key authority regarding all processes involved in generating data from a specific area (e.g., microbiology, inorganic non-metals) including sample preparation, instrument calibration, sample analysis, quality control, identification and quantitation, and reporting to ensure that all data reported from this specific area meet quality assurance (QA) criteria and regulatory requirements.
- c) not be the technical expert(s) of more than one accredited environmental laboratory without authorization from the primary Accreditation Body
- d) if absent for a period of time exceeding fifteen (15) consecutive calendar days shall designate another staff member meeting the qualifications of the technical expert(s) to temporarily perform this function. If this absence exceeds thirty-five (35) consecutive calendar days, the primary accreditation body shall be notified in writing; and

5.2.6.1 Technical Expert Qualifications

The applicable requirements for technical experts are given below. Where a degree is required, the Technical Expert must be able to provide to the assessor a copy of the diploma which was awarded and proof that the diploma was issued from an institution accredited by an organization recognized by the US Department of Education or equivalent international organization, at the time the diploma was issued.

- a) Any technical expert of an accredited environmental laboratory engaged in chemical analysis shall be a person with an earned bachelor's degree in the chemistry, environmental sciences, biological sciences, physical sciences or engineering, or equivalent, and at least two (2) years of experience in the analysis of representative inorganic and organic analytical technologies for which the laboratory seeks or maintains accreditation. A master's or doctoral degree in one of the above disciplines may be substituted for one (1) year of experience.
- b) Any technical expert of an accredited environmental laboratory limited to inorganic chemical analysis, other than metals analysis, shall be a person with at least an earned associate's degree in chemistry, environmental, biological sciences, physical sciences or engineering, or equivalent, or two (2) years of equivalent and successful college education, and at least two (2) years of experience in the environmental analysis of representative inorganic and organic analytical technologies for which the laboratory seeks or maintains accreditation.

A person with an associate's degree in an appropriate field of the sciences or applied sciences, with a minimum of three (3) college semester credit hours in general chemistry and at least one (1) year of experience in the analysis of representative analytical technologies for which the laboratory seeks or maintains accreditation may be the technical expert of a laboratory engaged in microbiological analysis using methods that employ presence/absence tests; membrane filtration, multi-tube fermentation, multi-well

culturing devices, or heterotrophic plate count techniques. Two (2) years of equivalent and successful college education may be substituted for the associate's degree.

- c) Any technical expert of an accredited environmental laboratory engaged in microbiological or biological analysis shall be a person with a bachelor's degree in microbiology, biology, chemistry, environmental sciences, physical sciences or engineering, or equivalent with at least one college-level microbiology laboratory course and at least two (2) years of experience in the analysis of representative technologies for which the laboratory seeks or maintains accreditation. A master's or doctoral degree in one of the above disciplines may be substituted for one (1) year of experience.

A person with an associate's degree in an appropriate field of the sciences or applied sciences, with a minimum of three (3) college semester credit hours in general microbiology and at least one (1) year of experience in the analysis of representative analytical technologies for which the laboratory seeks or maintains accreditation may be the subject matter expert of a laboratory engaged in microbiological analysis using methods that employ membrane filter, multi-tube fermentation, multi-tube dilution, or heterotrophic plate count techniques. Two (2) years of equivalent and successful college education, including the microbiology requirement, may be substituted for the associate's degree.

- d) Any technical expert of an accredited environmental laboratory engaged in radiological analysis shall be a person with a bachelor's degree from an accredited institution in chemistry, environmental, biological sciences, or physical sciences or engineering, or equivalent and at least two (2) years of experience in the analysis of representative radiological analytical technologies for which the laboratory seeks or maintains accreditation. A master's or doctoral degree in one of the above disciplines may be substituted for one (1) year experience.

5.2.6.2 Technical Expert Qualification Exceptions

- a) The Accreditation Body may waive the need for the above specified academic credentials, on a case-by-case basis, for highly experienced analysts. The laboratory may seek an educational waiver if the proposed subject matter expert meets the following experience criteria:
 - i. A technical expert with an earned associate's degree instead of the requisite bachelor's degree shall have at least four (4) years of experience in the analysis of representative analytical technologies for which the laboratory seeks or maintains accreditation.
 - ii. A technical expert with no degree shall have at least five (5) years of experience in the analysis of representative analytical technologies for which the laboratory seeks or maintains accreditation.
- b) The Accreditation Body may also waive the need for the above specified analytical experience, on a case-by-case basis, for subject matter expert(s) of a laboratory associated with a facility that only analyze samples from that facility.
- c) If such a waiver is granted based on paragraphs a) or b), the Accreditation Body will prepare a written and signed justification for such a waiver.
- d) Notwithstanding the educational and experience requirements in 5.2.6.1, an individual who has been credentialed by an organization such as the American Water Works Association (AWWA), the Water Environment Federation (WEF) or The NELAC Institute (TNI) shall be considered to possess the requisite qualifications.