On Site Assessment Committee Meeting  
Forum on Environmental Laboratory Accreditation  
Newport Beach, CA  
January 17, 2008

Committee members present:  
Denise Rice (Chair)  
Mark Mensik  
Don Cassano  
Besty Ziomek  
Margo Hunt  
Nilda Cox  
John Gumpper  
Jane Wilson (Program Administrator)

Denise Rice welcomed the attendees and reviewed the agenda. The meeting is a working Committee session to review the technical course criteria for On site Assessment (an outline of the Technical Course Examination guidance was provided).

Technical Course criteria

Denise reviewed that the Committee members had been surveyed about technical course exams, what has worked in the past, what didn’t, etc. The material that was formerly Appendices A and B in the NELAC 2003 standard is not part of the TNI On site Assessment module. The material is being converted to guidance documents for flexibility. The proposed technical course criteria are posted on the TNI website until February 2008 for comment.

The purpose of the assessor examination is the following:
- Demonstrate basic competency in the course material.
- Determine technical competency and ability to audit in the technical field.
- Demonstrate knowledge of the standard itself.
- Verify active participation in the coursework.

Testing out based on an assessor’s existing technical competency is not an option.

Denise reviewed the Technical Course Examination guidance handout (developed from the committee survey responses) for the attendees. One of the issues discussed in detail included whether exercises should be part of the final exam score. The group agreed that it can be difficult to objectively score participation in exercises but exam questions should be derived from the exercise materials and activities, particularly on identification of audit deficiencies.

A straw vote on the recommended passing score supported a score of 70 (the other options were 75 and 80).
The group reviewed the list of recommended topics to include on the examination. The technical course criteria need to include record-keeping and documentation. It was recommended that for all analytes the following be added (in addition to what is on the handout):

- Improper practices
- Calculations

The following additions to each analytical area were suggested.

Inorganic non-metals:
- Calibration and verification
- Preparations
- Critical method techniques
- Routine maintenance

Metals: No additions recommended

Microbiology:
- Equipment and instrumentation calibration and maintenance
- Frequency and evaluation of QC checks
- Invalidation of sample results

It was also suggested that Contamination control measures and Problems associated with determining pH of media be deleted from the proposed list.

Organic: No additions recommended

Radiochemistry:
- Background checks
- Calculations measurement uncertainty
- Detection limits
- Method QC
- Improper techniques and method modifications
- Facility and environmental controls

Toxicity:
- Organism identification (stock culture control)
- Verifying food quality
- Environmental controls [Barbara Escobar has some info from EPA that might help]
- Water quality

*Basic Assessor Training (NELAC Appendix A)*
Denise reviewed the development of the guidance document to replace NELAC Appendix A for On Site Assessment. For the TNI Standards, it will cover the Environmental Sector Volume 1, Modules 1 thru 7, Volume 2 Modules 1 thru 3, and Volume 3. It will not include the Field Sampling Sector, at least initially.

The participants reviewed the current content of Appendix A and discussed whether to use the existing Appendix A as a template or drive the content from the TNI Standards modules. The following suggestions were made about content from Appendix A:

- Delete the content of section A.3 Course logistics with the exception of the last sentence of the second paragraph.
- Section A.3.1 Duration may be at the discretion of the instructor. The course is recommended to take a minimum of two days, but most likely requires 3 days. Duration may be dependent on the skill level of attendees.
- Sections A.3.2, A.3.3 and A.3.4 could be combined. Separate documentation for course attendance and examination passage should be provided to participants. Text on Final Examination and Certificate of completion should be moved to the end of the guidance document.
- Section A.3.6 Appraisal of course can just require the instructor to provide a mechanism for feedback. There will be a mechanism for TNI “approval” of courses to be developed in the future.
- For section A.4 Course contents, Appendix A is very detailed and prescriptive and perhaps a lot of it is not needed. The focus should be on the subsection headings rather than the rest of the content detail. It was suggested that the applicable TNI modules be reviewed to identify appropriate headings and the overall layout of the Course contents section, with the inclusion of ISO 17025. High level headings might look like the following:

I. History of TNI and the development of the TNI standards (include transition to ISO 17025-based standard)
II. Fundamentals and structure of TNI and ISO
III. Volume 2 modules
IV. Volume 1 modules
V. Volume 3 modules