

**Quality System Expert Committee (QS)  
Meeting Summary**

**December 10, 2018**

1. Roll Call:

Paul Junio, Chair, called the meeting to order at 1pm Eastern on December 10, 2018 by teleconference. Attendance is recorded in Attachment A – there were 9 members present. Associate Members present: Chaney Arend, Carol Barrick, Tyler Sullens, Eric Denman, Carl Kircher, Rachel Van Exel, Eric Davis, Charles Hartke, Patty Carvajal, Linda O'Donnell, Rose Cruz, Cindy Gaddis, Nirmela Arsem

The November meeting minutes were sent to the Committee last Friday. Paul will give people more time to review them, so they will be approved by email.

*(Addition: A motion was made by Jessica on 12/10/18 by email to approve the 11-15-18 meeting minutes as written. The motion was seconded by Bill on 12/10/18. The following votes were received:*

*Dale - For (12/19/18)*

*Kristin - For (12/19/18)*

*Jessica - For (12/19/18)*

*Kathi - For (12/19/18)*

*Shari - For (12/19/18)*

*Chris - For (12/19/18)*

*Jacob - For (12/19/18)*

*Matt - For (12/19/18)*

*Michelle - For (12/20/18)*

*The motion passed and the minutes were approved.)*

2. Committee Membership

Paul reminded everyone that there is committee membership training that should be reviewed: (<http://nelac-institute.org/eds/download/ChairTraining.php>).

He also let everyone know that he is going through applications for committee membership and he will be sending these out for review and consideration before the January meeting.

A new Chair and Vice-Chair will need to be selected at the January meeting. Contact Paul or Ilona with any questions or if you interested.

### 3. Technical Manager

The Committee continued its discussion on Technical Director. Paul sent out some changes to the language in Sections 6.2.2.1 and 6.2.2.2 that were reviewed and commented on by email. Additional changes were made to this language during the call today (Sections 6.2.2.1(a) and 6.2.2.2) and all changes through today's meeting can be found in Attachment D.

Discussion Points:

Carl noted that Florida does not mandate a "should" as a "must" so the Region 4 text on this topic is not a requirement, but Florida does try to comply.

An operator certificate can substitute for some education as an exception.

Bill thinks more options are needed – add WEF, etc... There are often local organizations that also award certificates.

Kathi and Jessica noted that there are already exemptions in the Standard, so why not build on those.

Ilona asked where the exemptions are being used. Kirstin commented that she only uses the exemptions for labs that are not commercial. She is not opposed to the idea of opening this up and expanding it in the re-write. The ABs want something in this section and do not just want to leave it up to the labs. Leaving it up to the labs makes them think the Standard is going backwards.

Others commented that is hard to get a Technical Manager qualified with the current requirements.

Paul asked the Committee if they would like to look at leaving the language as it is, but adding exemptions. There was no one opposed to this.

- Kathi liked this approach.
- Jessica liked this approach.
- Michelle commented that you could do something similar, but leave the exemptions up to the ABs.
- Bill commented that California added to the TNI Standard in this area. He asked why other ABs couldn't do the same thing. Ilona noted that the hope is provide some consistency in this area between all the ABs. Bill asked if there are really all that many labs that do work in multiple states. Is TNI there to help interstate commerce or is it more concerned about known and documented quality? Maybe this is an area where you give states more freedom. Jessica commented that reciprocity between States is important to many labs. California decided that there is some testing that needs more

technical people and they call them principle analysts. There is also testing that doesn't require this level of expertise (utility labs).

- Michelle noted that it sounds like everyone wants their cake and to eat it too. We want exemptions and opportunities for experience to be able to fill in that spot, and now when we talk about letting ABs decide if that person has enough experience ... this is not good enough.
- Carl asked if labs could consider having a contract for a Technical Manager – similar to how they have service contracts for instrumentation when they can figure out what is wrong or don't have the expertise to fix it. The lab decides when they need the expertise and they hire it in. Paul noted you would need criteria for when this contractor would need to be called. Others thought there would need to still be requirements for how often this expertise should be on-site.

Carl commented that whatever Standard gets put out in the future, it needs to be an improvement over the “old” Standard. This is a requirement and will be considered during voting.

Linda O'Donnell (municipal lab viewpoint) noted that in Pennsylvania their requirements are based on TNI even though they are not a NELAP accredited lab.

Paul would like to continue this discussion by email and at the next meeting. He would like to focus on 6.2.2.1(a) and will send the language out to the Committee (see Attachment D).

#### 4. Action Items

A summary of action items can be found in Attachment B.

#### 5. New Business

None.

#### 6. Next Meeting and Close

The next meeting will be on Monday, January 14<sup>th</sup> at 1pm Eastern. Ilona will send a Webex invitation the morning of the meeting. *(Addition: Webex will not be available for this meeting due to a Microbiology Assessor training on the same day.)*

A summary of action items and backburner/reminder items can be found in Attachment B and C.

Paul adjourned the meeting at 2:17pm Eastern. (Jessica - motion Bill – second, unanimous approval).

Attachment A

**Participants  
Quality Systems Expert Committee (QS)**

Member	Organization	Expiration	Representation	Email
Paul Junio (Chair) <b>Present</b>	Northern Lake Service	2019	Laboratory	paulj@nslslab.com
Jessica Jensen (Vice Chair) <b>Present</b>	Meridian Analytical Labs	2021	Laboratory	jessica.j@meridiantesting.com
Kristin Brown  <b>Present</b>	Utah DOH	2021	Accrediting Body	kristinbrown@utah.gov
Lizbeth Garcia  <b>Absent</b>	Oregon Dept. of Environmental Quality	2019*	Accrediting Body	LIZBETH.GARCIA@dhsosha.state.or.us
Kathi Gumpfer  <b>Present</b>	ChemVal Consulting	2021*	Other	kgumpfer@chemval.com
Chris Gunning  <b>Present</b>	A2LA	2021	Accrediting Body	cgunning@a2la.org
Earl Hansen  <b>Absent</b>	Retired	2021*	Laboratory	papaearl41@hotmail.com
Jenna Majchrzak  <b>Present</b>	NJ DEP	2021*	Accrediting Body	Jenna.Majchrzak@dep.nj.gov
Jacob Oaxaca  <b>Absent</b>	California State Water Board	2019*	Accrediting Body	Jacob.Oaxaca@Waterboards.ca.gov
Shari Pfalmer  <b>Absent</b>	ESC Lab Sciences	2021	Laboratory	spfalmer@esclabsciences.com
Dale Piechocki  <b>Absent</b>	Eurofins Eaton Analytical	2020	Laboratory	DalePiechocki@eurofinsUS.com
William Ray  <b>Present</b>	William Ray Consulting	2020*	Other	Bill_Ray@williamrayllc.com
Matt Sowards  <b>Present</b>	ACZ Laboratories, Inc.	2020	Laboratory	MattS@acz.com
Michelle Wade  <b>Present</b>	Wade Consulting	2021*	Other	michelle@michellefromks.com
Alyssa Wingard  <b>Absent</b>	NAVSEA LQAO	2021*	Other	alyssa.wingard@navy.mil
Ilona Taunton (Program Administrator) <b>Present</b>	The NELAC Institute	n/a	(828)712-9242	<a href="mailto:Ilona.taunton@nelac-institute.org">Ilona.taunton@nelac-institute.org</a>

**Attachment B**

**Action Items – QS Expert Committee**

	<b>Action Item</b>	<b>Who</b>	<b>Expected Completion</b>	<b>Actual Completion</b>
25	Follow-up with Bob Wyeth and Jerry Parr about experience vs. course hours for Technical Directors.	Paul	TBD	
26	Provide in writing, thoughts regarding options for Technical Director approval.	Robin	TBD	
38	Continue SIR 246 and 296 discussions.	All	TBD	
40	Get PT root cause analysis example from Scott Hoatson.	Paul	8/31/17	
45	Review Ch 1 Application section for the use of “shall” and “may”. Are uses correct?	Paul, Sara	11/20/17	
51	Send example of Shari’s report to NELAP AC to confirm format of listing all certifications without logo’s is an acceptable process to report certifications for work being done.	Shari Paul	5/11/18	
53	Look into CWEA certification requirements.	Nick Jacob	7/9/18	
56	Reach out to Marlene Moore for additional information on Class A glassware.	Paul	7/9/18	
57	Look into status on labware SIR.	Paul	7/9/18	
58	Look into SIR 154 Response. Incorrect response may be posted.	Paul/Ilona	9/10/18	



### 6.2.2.1 Technical Manager Qualifications

The applicable requirements for technical managers are given below.

- a) Any technical manager of an accredited environmental laboratory engaged in chemical analysis shall be a person:
  - i. with a bachelor's degree in the chemical, environmental, biological sciences, physical sciences or engineering [\[EDIT – what about this list - in chemistry, biochemistry, biology, microbiology, environmental, sanitary or public health engineering, natural or physical science; or this list - in chemistry, biochemistry, physics, environmental science, biology, microbiology, physical sciences or engineering; or this list - in chemistry or a biological science; if the bachelor's degree is in a field other than chemistry or a biology science, the individual should have college-level credit hours sufficient to qualify for a minor in chemistry or biology\]; and \[edit – need a well-defined job description to the function of the position – probably falls on the laboratory; edit – accredited degrees as opposed to non-accredited degrees needs to be addressed; foreign or other degrees need vetting of some sort – translation service exists \(Linda ODonnell\)\]](#)
  - ii. with at least twenty-four (24) college semester credit hours [\(or at least thirty-six \(36\) college quarter credit hours\)](#) in chemistry; and
  - iii. and at least two (2) years of experience in the environmental analysis of representative inorganic and organic analytes 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 manager of an accredited environmental laboratory limited to inorganic chemical analysis, other than metals analysis, shall be a person:
  - i. with at least an earned associate's degree in the chemical, physical or environmental sciences, or two (2) years of equivalent and successful college education; and
  - ii. with a minimum of sixteen (16) college semester credit hours [\(or at least twenty-four \(24\) college quarter credit hours\)](#) in chemistry; and
  - iii. and have at least two (2) years of experience performing such analysis.
  
- c) Any technical manager of an accredited environmental laboratory engaged in microbiological or biological analysis shall be a person:
  - i. with a bachelor's degree in microbiology, biology, chemistry, environmental sciences, physical sciences or engineering; and
  - ii. with a minimum of sixteen (16) college semester credit hours [\(or at least twenty-four \(24\) college quarter credit hours\)](#) in general microbiology and/or biology; and
  - iii. at least two (2) years of experience in the environmental analysis of representative analytes 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 four (4) college semester credit hours in general microbiology may be the technical manager(s) of a laboratory engaged in microbiological analysis limited to fecal coliform, total coliform, E. coli, and standard plate count. Two (2) years of equivalent and successful college education, including the microbiology requirement, may be substituted for the associate's degree. In addition, each person shall have one (1) year of experience in microbiological analyses. [ed – less complex tests? What should be the limitations here? New requirements/analyses don't get addressed]



- d) Any technical manager of an accredited environmental laboratory engaged in radiological analysis shall be a person:
  - i. with a bachelor's degree in chemistry, environmental, biological sciences, physical sciences or engineering; and
  - ii. with twenty-four (24) college semester credit hours ([or at least thirty-six \(36\) college quarter credit hours](#)) of chemistry; and
  - iii. with two (2) or more years of experience in the radiological analysis of environmental samples. A master's or doctoral degree in one of the above disciplines may be substituted for one (1) year experience.
  
- e) The technical manager(s) of an accredited environmental laboratory engaged in microscopic examination of asbestos and/or airborne fibers shall meet the following requirements:
  - i. For procedures requiring the use of a transmission electron microscope, a bachelor's degree; and
    - a. successful completion of courses in the use of the instrument;
    - b. and one (1) year of experience, under supervision, in the use of the instrument. Such experience shall include the identification of minerals.
  - ii. For procedures requiring the use of a polarized light microscope;
    - a. an associate's degree or two (2) years of college study; and
    - b. successful completion of formal coursework in polarized light microscopy; and
    - c. one (1) year of experience, under supervision, in the use of the instrument. Such experience shall include the identification of minerals.
  - iii. For procedures requiring the use of a phase contrast microscope, as in the determination of airborne fibers:
    - a. an associate's degree or two (2) years of college study; and
    - b. documentation of successful completion of formal coursework in phase contrast microscopy; and
    - c. one (1) year of experience, under supervision, in the use of the instrument.
  
- f) Any technical manager of an accredited environmental laboratory engaged in the examination of radon in air shall have:
  - i. at least an associate's degree or two (2) years of college; and
  - ii. one (1) year of experience in radiation measurements; and
  - iii. at least one (1) year of experience in the measurement of radon and/or radon progeny.

#### 6.2.2.2 Technical Manager Qualification Exceptions

- a) A person who has passed a course offered by an organization such as [WEF, AWWA \(whether local or national\)](#) or TNI for managing or operating a laboratory appropriate to the nature and size of such facility shall be deemed to meet the educational requirements as the technical manager. A technical manager shall have two (2) year testing experience devoted exclusively to the testing of environmental samples specified in the scope of the facility's regulatory permit. Such accreditation for a water treatment facility and/or a sewage treatment facility shall be limited to the scope of that facility's regulatory permit. [\[edit – address lab scope and size as well, not just for treatment facilities\]](#)
  
- b) Notwithstanding any other provision of this Section, a full-time employee of a drinking water or sewage treatment facility who holds a valid treatment plant operator's certificate appropriate to the nature and size of such facility shall be deemed to meet the educational requirements as the technical manager. A technical manager shall have two (2) year testing experience devoted exclusively to the testing of environmental samples

specified in the scope of the facility's regulatory permit. Such accreditation for a water treatment facility and/or a sewage treatment facility shall be limited to the scope of that facility's regulatory permit.

- c) A full-time employee of an industrial waste treatment facility with a minimum of two (2) years of experience under supervision in testing of environmental samples taken within such facility for the scope of that facility's regulatory permit shall be deemed to meet the requirements for serving as the technical manager of an accredited laboratory. Such accreditation for an industrial waste treatment facility shall be limited to the scope of that facility's regulatory permit.
- d) Persons who do not meet the education credential requirements but possess the requisite experience of Section 6.2.2.1 shall qualify as technical manager(s) subject to the following conditions.
  - i) The person shall be a technical manager of the laboratory on the date the laboratory applies for accreditation and/or becomes subject to accreditation under this Standard, and shall have been a technical manager in that laboratory continuously for the previous twelve (12) months or more.
  - ii) The person will be approved as a technical manager for only those fields of accreditation for which he/she has been technical manager in that laboratory for the previous twelve (12) months or more.
  - iii) A person who is admitted as a technical manager under these conditions, and leaves the laboratory, will be eligible for hire as a technical manager for the same fields of accreditation in another accredited laboratory.
  - iv) [\[edit – leave open to the AB to approve a person by overriding these requirements\]](#)