Quality Management System Expert Committee (QMS)
Meeting Summary

July 14, 2025

1. Roll Call/Minutes Approval:

Debbie Bond, Chair, called the meeting to order at 1pm Eastern by teleconference on July 14, 2025. Attendance is recorded in Attachment A – there were 9 voting members present as noted. Associate members present: Homer Youngblood, Fida Kased, Ty Atkins, Tammy Kreutzer, Cindy Redmond, Linda O'Donnell, Paul Junio, Lee Ann Kline, Sheela Agrawal, Carl Kircher (phone only), Ryan McMullin, Kim Fielder, Nicole Van Aken, Debra Zeller, Nicholas Evans, Stephanie Drier, Lynn Boysen, Nicholas Johnson, and Windsor Molnar.

There were no changes made to the agenda. The agenda was approved by unanimous consent.

At the start of the meeting, there was not a quorum, so no formal business could be done and thus the minutes could not be approved. The minutes will be sent out for vote. Note: Additional members did join in later, but there were not more than 8 when Debbie checked to vote on the minutes later.

(Addition: The May and June minutes were sent out for approval by email. A motion was made by Carla on by email on July 18, 2025 to approve the May 12, 2025 and June 9, 2025 minutes as written. The motion was seconded by email on July 18, 2025 by Joann. There was no further discussion. Vote: For – 7/22/25: Ashley, Carla, Michael, Zaneta 7/21/25: Tony, Joann, Caitie, Nicole, Nicholas and Debbie. Against: 0 Abstain: Carol. The motion passed and the minutes were approved.
Note: 6/23/25: The minutes for this workgroup meeting will be updated to include additional detail including the meeting attendance before posting.)

Sheela Agrawal, a new Associate Member, introduced herself.

2. Technical Specialist

Debbie shared the current Technical Specialist language and asked for comments.

Section 5.6.3: Ilona asked if Analytical Disciplines have been defined. There wll be no definition because it will be in the body of the Standard. Ilona will check-in with Amanda (Chair, Radiochemistry) because it looks like their Analytical Disciplines are not what they had asked for.

Does the term Analytical Disciplines impact on other Standards. Is everyone OK with this term? There is no mention of Analytical Disciplines in the LAB Standard being updated.

Section 5.6.3.b: Need to add resume work. This is described in Section 7.10. This section does not use the term "stop work". It needs to be clear that the Technical Specialist must be in agreement with resumption of work for work to continue. After extensive conversation, the language was rewritten (see Attachment B). They have the authority. What if they are on vacation? The Deputy takes over.

There wre concerns raised about how small labs will handle this language and other language in the Standard. Ilona commented that perhaps this could be handled by putting a class together to show how the Standard can be implemented for labs with 1-3 people. The Standard applies whether you are a one person laboratory or 150 person laboratory.

Section 5.6.6: "When" was replaced with "If" in 5.6.6.a. The Committee will consider including in Annex C some information on how a laboratory handles the TS (and maybe deputy) being unable to fulfill the role, even if the 15 days aren't met (see Attachment B).

The Committee will consider making a statement that the role's title is Technical Specialist or however named. The responsibilities and requirements for the role stay the same.

Section 6

- Analytical discipline scope expansion was removed.
- The Committee will need to come back to the Credentialing language as the Stnadard reaches completion. People are not comfortable leaving this language in if the credential is not available yet.
- Consider whether it should just be credential and not Technical Specialist Credential?
- Experience needs to be defined. Experience is a lab? School? In the Analytical Discipline?
- Stephanie noted that Minnesota tries to take the qualification requirements and turn them into a spreadsheet/woksheet so someone can evaluate their own resume and transcript and see if they meet the requirements.
- Should a Masters or PhD also have the STEM requirement?
- Are there issues witn international degrees that need to be considered? This could perhaps be considered in Annex C.

This is where the Committee will pick-up again at the next Workgroup meeting.

The Committee will have additional workgroup meetings on 7/21/25 at 1pm Eastern and 7/28/25 at 1pm Eastern to work on the Technical Specialist language to prepare for the St. Louis meeting.

(Addition:
7/21/25: The following voting members attended the meeting: Ashley Larssen, Debbie Bond, Nicole Cairns, Caitie VanSciver, Carol Gebhart, and Michael Desmarais. Associate members in attendance included: Lisa Parks, Sheela Agrawal, Paul Junio, Sara Duran, Carol Barrick, Katie Strothman, Tammy Kreutzer, Carl Kircher (by phone only), Lynn Boysen, Kristin Brown, Nicholas Evans, Ryan McMullin, Annmarie Beach, Linda O'Donnell, Nicole Van Aken, Bill Reeves, Lien Nguyen, Debra Zeller and Nicholas Johnson.

Debbie sent a copy of the Technical Specialist language with the updates made during the Workgroup meeting (Attachment C) to the Committee for comment and input.

7/28/25: The following voting members attended the meeting: Michael Desmarais, Ashley Larssen, Joann Slavin, Debbie Bond, Amy Schreader, Nicole Cairns, and Carol Gebhart. Associate members in attendance included: Jeanette Hernandez, Bill Reeves, Nicholas Evans, Lynn Boysen, Debra Zeller, Lien Nguyen, Ryan McMullin, Windsor Molnar, Annmarie Beach, Kim Felder, Matt Sica, Stephanie Drier, Nicole Van Aken, Lisa Parks, Carl Kircher (phone only), Paul Junio and Cindy Redmond.

Debbie sent a copy of the Technical Specialist language with the updates made during the Workgroup meeting (Attachment D) to the Committee for comment and input.)

3. New Business

   None.

4. Action Items

   A summary of Action Items can be found in Attachment E.

5. Next Meeting and Close

   The next Committee meeting will in St. Louis on August 6, 2025. There will be optional Workgroup meeting on July 21st and 28th at 1pm Eastern by teleconference.

   Debbie adjourned the meeting at 2:25 pm Eastern.

Attachment A
Participants
Quality Systems Expert Committee (QS)

Member	Organization	Expiration	Representation	Email
Debbie Bond (Chair) **Present**	Alabama Power	2026	Lab	dbond@southernco.com
Carla McCord **Present**	Virginia	2025*	AB	carla.mccord@dgs.virginia.gov
Nicole Cairns **Absent**	NYSDOH	2027	Lab	nicole.cairns@health.ny.gov
Michael Demarais **Present**	SVL Analytical	2026	Lab	michael@svl.net
Tony Francis **Present – 1:46pm Eastern (last 5 min)**	SAW Environmental	2026	Other	tfrancis@sawenviro.com
Carol Gebhart **Present**	ALS Global	2027*	Lab	Carol.gebhart@alsglobal.com
Stephanie Atkins **Present – 1:12pm**	Pace Analytical	2027	Lab	stephanie.atkins@pacelabs.com
Nicholas Slawson **Absent**	A2LA	2026	Accrediting Body	nslawson@a2la.org
Joann Slavin **Absent**	Wadsworth Center/Environmental Laboratory Approval Program	2027*	Accrediting Body	joann.slavin@health.ny.gov
Caitie Van Sciver **Present (Left 1:28p)**	NJDEP	2027*	Accrediting Body	Caitie.vansciver@dep.nj.gov
Zaneta Popovska **Present**	ANAB	2025*	AB	zpopovska@anab.org
Sean Hayes **Absent**	ORELAP	2026*	AB	sean.hayes@oha.oregon.gov
Amy Schreader **Present (Left 2:17p)**	UC Laboratory	2027	Lab	amy@uclaboratory.net
Ashley Larssen **Absent**	KC Water	2027	Lab	XXXX
Ilona Taunton (Program Admin) **Present**	The NELAC Institute	n/a	n/a	Ilona.taunton@nelac-institute.org

5 Structural requirements

5.1 *The laboratory shall be a legal entity, or a defined part of a legal entity, that is legally responsible for its laboratory activities.*

NOTE For the purposes of this document, a governmental laboratory is deemed to be a legal entity on the basis of its governmental status.

5.2 *The laboratory shall identify management that has overall responsibility for the laboratory.*

5.3 *The laboratory shall define and document the range of laboratory activities for which it conforms with this document. The laboratory shall only claim conformity with this document for this range of laboratory activities, which excludes externally provided laboratory activities on an ongoing basis.*

5.4 *Laboratory activities shall be carried out in such a way as to meet the requirements of this document, the laboratory's customers, regulatory authorities and organizations providing recognition. This shall include laboratory activities performed in all its permanent facilities, at sites away from its permanent facilities, in associated temporary or mobile facilities or at a customer's facility.*

5.5 *The laboratory shall:*

a) define the organization and management structure of the laboratory, its place in any parent organization, and the relationships between management, technical operations and support services;

b) specify the responsibility, authority and interrelationship of all personnel who manage, perform or verify work affecting the results of laboratory activities;

c) document its procedures to the extent necessary to ensure the consistent application of its laboratory activities and the validity of the results.

5.6 *The laboratory shall have personnel who, irrespective of other responsibilities, have the authority and resources needed to carry out their duties, including:*

a) implementation, maintenance and improvement of the management system;

b) identification of deviations from the management system or from the procedures for performing laboratory activities;

c) initiation of actions to prevent or minimize such deviations;

d) reporting to laboratory management on the performance of the management system and any need for improvement;

e) ensuring the effectiveness of laboratory activities.

5.6.3 The laboratory ~~shall designate~~must have (a) Technical Specialist(s) to provide technical guidance to laboratory personnel for each TNI-defined analytical discipline (Asbestos, Microbiology, Radiochemistry, Whole Effluent Toxicity, Inorganic Chemistry – Nonmetals, Inorganic Chemistry – Metals, Organic Chemistry) corresponding to the fields of accreditation listed in the laboratory's scope of accreditation. A single individual may be appointed as the Technical Specialist for one or more TNI-defined analytical disciplines and may also hold additional primary job responsibilities.

Technical specialist(s) must:

a) provide guidance and oversight to laboratory personnel as needed to ensure activities related to the generation of analytical data and test results, including but not limited to method development and validation, procedure development, sample preparation, instrument calibration, sample analysis, quality control, and data reduction comply with the laboratory's quality management system and with relevant regulatory requirements for which the data will be used and

b) have the authority to halt work, repeat work, withhold reports, and resume work as part of the management of nonconforming work, as defined in 7.10. ~~oversee or participate in decisions and actions related to the management of nonconforming work~~, ~~including the authority to authorize 'stop work' requirements~~.

Commented [DB1]: From Jacksonville '25: all good as written

Commented [DB2]: Radiochemistry will be split into several analytical disciplines soon.

Commented [KD3]: I replaced responsibility with guidance and oversight. "responsibility to manage" by common definition implies the technical specialist has supervisory or management responsibility, which is not required. I think oversight is a better description of intent.
I also removed "key personnel" which I know is controversial. In some labs the TS may be key personnel. In a lab like PAS, a role is not key personnel until it is at the Director or Officer level, which the exception of the Quality Manager. We have 1 Chief Technical Officer for our 80+ labs and I think 4 Technical Directors. Tech Spec for TNI are usually bench analysts. Bench analysts are not involved in decisions that affect our business - they are not key personnel, the CTO is. Also the whole concept of key personnel is that here is a deputy to maintain - Section 5.6.5 essentially fulfills the intent of key personnel so I don't think the removal of the statement that TS are key personnel is significant.

Commented [PJ4]: Is this sufficient for giving authority to stop a method?

~~b)~~

5.6.4 A Technical Specialist may be appointed across multiple laboratories, subject to approval by the primary accrediting body. Requests for approval must include a plan outlining how the Technical Specialist will meet the requirements in section 5.6.3 across multiple locations. Records of the accrediting body's approval, including the approved plan, must be maintained.

5.6.5 The laboratory must have a deputy(ies) for the Technical Specialist(s). ~~:~~

~~a)~~ The deputy is not required to meet the qualification requirements of a Technical Specialist.

5.6.6 The deputy must assume the responsibilities of the Technical Specialist when the Technical Specialist is unable to fulfill the duties specified in sections 5.6.3 a) and b) for fifteen (15) consecutive calendar days.

a) ~~When~~ If the deputy has assumed the responsibilities of the Technical Specialist for more than sixty (60) consecutive calendar days, the laboratory must notify the accreditation body in writing and include a plan with a timeline for appointing a qualified Technical Specialist.

6 Resource requirements

6.1 General

The laboratory shall have available the personnel, facilities, equipment, systems and support services necessary to manage and perform its laboratory activities.

6.2 Personnel

6.2.1 *All personnel of the laboratory, either internal or external, that could influence the laboratory activities shall act impartially, be competent and work in accordance with the laboratory's management system.*

6.2.2 *The laboratory shall document the competence requirements for each function influencing the results of laboratory activities, including requirements for education, qualification, training, technical knowledge, skills and experience.*

~~6.2.2.1 Technical Specialist Qualification Documentation and Records~~

~~Laboratory management shall develop a document outlining the required education and experience for a Technical Specialist, however named. The laboratory shall maintain a record showing that each Technical Specialist meets the education and experience requirements. Where coursework is required, the laboratory must retain supporting records that show courses were successfully completed (e.g., certificate, letter, transcript). Section 4 of Modules 3 through 7 may include specific requirements for Technical Specialist qualifications.~~

6.2.2.1 Technical Specialist Qualifications

Technical Specialist qualifications are based on: education and experience, credentialing, or recognition by previous revisions of this Standard~~, and or technical/analytical discipline scope expansion~~.

The laboratory shall maintain a record showing that each Technical Specialist meets the requirements of 6.2.2.2~~The laboratory must maintain records that demonstrate the technical specialist(s) meet(s) the qualifications~~ or exceptions ~~defined below~~of 6.2.2.3. Where coursework is required, the laboratory must retain supporting records that show courses were successfully completed (e.g., certificate, letter, transcript).

6.2.2.2 A technical specialist must meet one set of the following minimum qualifications for each ~~technical/~~analytical discipline for which they are responsible, where the required experience is in the

Commented [DB5]: From Jacksonville '25: Consider providing competency record for Deputy TS to AB.

Commented [DB6R5]: From Jacksonville '25: Instead of b) and c) add a requirement to notify AB when TS cannot fulfill duties within x days along with a plan on how and when the lab will have a TS fulfilling the role.

Commented [DB7]: Question for TNI/Robin: How does this affect a 1-person lab? Is a 1-person lab effectively able to maintain the QMS outlined in this standard?

Commented [DB8]: From Mike Michaud email 2/6/25: I think we need to consider adding a description to define it. Something similar to they must have experience in the area they will be responsible for or must have experience performing the methods they will be responsible for.

Commented [DB9R8]: The deputy will not have qualification requirements, so this is unnecessary.

Commented [DB10]: Consider including in Annex C some information on how a laboratory handles the TS (and maybe deputy) being unable to fulfill the role, even if the 15 days aren't met.

Commented [DB11]: From Jacksonville '25: Change "additional" to "specific"

Commented [DB12]: REMOVE IF WE KEEP the rest of 6.2.2.1

Commented [DB13]: Ensure we are not requiring environmental experience where non-environmental will be just as valuable.

Commented [PJ14]: Requiring our own program and we need to be open to others. We've written a standard that allows us to profit from how it is written. Re-write to be less specific, yet allow other credential types.

Commented [PJ15]: Should this be or?

Commented [BD16]: Update once new analytical discipline scope addition paragraph is complete

Commented [DB17]: Consider adding to Annex C a link to the site that includes equivalency of different country's degrees to USA degrees.

Commented [PJ18]: This doesn't address an Associates Degree, but that's what the Technical Modules reference

corresponding ~~technical/~~analytical discipline(s). In addition, analytical disciplines for Asbestos, Microbiology and Radiochemistry require a relevant technical course.~~:~~

* a master's or doctoral degree and one (1) year of experience,

* a bachelor's degree in a scientific field that includes STEM (science, technology, engineering, math) courses and two (2) years of experience,

* an associates degree in a scientific field that includes STEM courses and three (3) years of experience,

* four (4) college level STEM ~~(science, technology, engineering, math)~~ courses and four (4) years of experience, or

~~* be 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 and have two (2) years of experience, or~~

* ~~TNI~~ technical specialist credential for each ~~technical/~~analytical discipline and one (1) year of experience.

6.2.2.3 Technical Specialist Qualification Options for Exempting Education and Experience Requirements

a) Any person who was ~~formally~~ formerly recognized as a Technical Specialist (however named) based on requirements or exceptions in previous revisions of this Standard will continue to be eligible as Technical Specialist for the same analytical disciplines at any accredited laboratory. Appropriate records must be available to show previous recognition as a Technical Specialist.

b) Any person who is an 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 and has two (2) years of laboratory experience is eligible as Technical Specialist.

~~b)~~c) [insert language for Primary AB approval of exempted Technical Specialist]

~~c) Any person 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 to be eligible as Technical Specialist.~~

d) ~~If a laboratory seeks accreditation for a method in a TNI-defined analytical discipline that is not currently on the laboratory's scope of accreditation, the person who is assigned responsibility for demonstrating performance of a method (installation documentation, method validation or verification, DOC, PT performance, etc.) is eligible to serve as Technical Specialist for that method.~~

Commented [BD19]: To qualify as a technical specialist, a candidate must have experience in the analytical disciplines for the area of responsibility and the education or training listed in one of the options listed below:

Commented [DB20]: STEM field

Commented [PJ21]: bachelor's degree that includes STEM (Science, Technology, Engineering, Mathematics) courses.

Commented [PJ22]: bachelor's degree that includes STEM (Science, Technology, Engineering, Mathematics) courses.

Commented [PJ23]: Seems like Associates Degree ought to be the next step in this set of options. Why is a Bachelors Degree the same as a valid treatment plant operator's license (each need it plus 2 years of experience)?

Commented [PJ24]: Did Bob determine if this is an ANSI conflict for us? Confer with Matt Sica and Nicolas Slawson

Commented [PJ25R24]: Not a conflict per Bob - delete TNI and we should be good.

Commented [DB26]: From Jacksonville '25 (Elizabeth Lesold): Potential conflict because some TP Operator certification (b) and credentialing (c) may overlap enough to cause confusion. For b) must have experience; what about for c)?

Commented [DB27]: From Jacksonville '25: Add that appropriate records must be maintained to show previous recognition as TS."

Commented [DB28]: From Jacksonville '25: Is this lab experience or experience as an operator? Or does it matter?

Commented [DB29]: Should we add analytical discipline to this experience?

Commented [DB30]: AC Feedback email 2/11/25: Regarding credentials, this seems like this could be a show stopper for several ABs present. Concern was brought up that we are including an unknown or future concept into the standard. Concern was brought up that no one was actually aware of what a WEF or AWWA credential actually was. There was also concern brought up that the credentialing concept would be used as a complete replacement for education, classwork, ar ... [1]

Commented [DB31R30]: From Jacksonville '25: change to "legitimate organization" or "TNI recognized credentialing organization"

Commented [DB32R30]: From Jacksonville '25: Better to say "credentialed by an authoritative body" or som ... [2]

Commented [DB33]: AC Feedback email 2/11/25: The way this is written on the slide indicates that a laboratory could apply for a method in an analytical discipline ... [3]

Commented [DB34R33]: From Jacksonville '25: Tracking TS by method is not possible. Could the end be "the TS for that analytical discipline"?

Commented [DB35R33]: From Jacksonville '25: This section could probably be removed since it was ad ... [4]

Page 3: [1] Commented [DB30] **Bond, Debbie** **3/7/25 7:52:00 AM**

AC Feedback email 2/11/25: Regarding credentials, this seems like this could be a show stopper for several ABs present. Concern was brought up that we are including an unknown or future concept into the standard. Concern was brought up that no one was actually aware of what a WEF or AWWA credential actually was. There was also concern brought up that the credentialing concept would be used as a complete replacement for education, classwork, and experience. Several ABS brought up the idea that it could possibly be used to replace experience or education to some extent.

Page 3: [2] Commented [DB32R30] **Bond, Debbie** **3/12/25 2:04:00 PM**

From Jacksonville '25: Better to say "credentialed by an authoritative body" or something like that than to call out specific organizations including TNI (see also how FSMO sections are worded).

Page 3: [3] Commented [DB33] **Bond, Debbie** **3/7/25 7:52:00 AM**

AC Feedback email 2/11/25: The way this is written on the slide indicates that a laboratory could apply for a method in an analytical discipline that they are not accredited for and be allowed to be technical specialist without any experience. For example they could apply for Organics when only being accredited for Micro, without any experience except setting up the method What we assume it should say is that a laboratory can apply for a method in an analytical discipline that they are accredited for.

Page 3: [4] Commented [DB35R33] **Bond, Debbie** **3/12/25 2:05:00 PM**

From Jacksonville '25: This section could probably be removed since it was added when we were looking at technologies instead of analytical disciplines.

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6.2.2.1 Technical Specialist Qualifications

Technical Specialist qualifications are based on: education and experience, credentialing, or recognition by previous revisions of this Standard.

The laboratory shall maintain a record showing that each Technical Specialist meets the requirements of 6.2.2.2 or exceptions of 6.2.2.3. Where coursework is required, the laboratory must retain supporting records that show courses were successfully completed (e.g., certificate, letter, transcript).

6.2.2.2 A technical specialist must meet one set of the following minimum qualifications for each analytical discipline for which they are responsible, where the required experience is in the corresponding analytical discipline(s). In addition, analytical disciplines for Asbestos, Microbiology and Radiochemistry require a relevant technical course.

* a master's or doctoral degree and one (1) year of experience,

* a bachelor's degree in a STEM (science, technology, engineering, or math) field and two (2) years of experience,

* an associates degree in a STEM field and three (3) years of experience,

* four (4) college level STEM courses and four (4) years of experience, or

* technical specialist credential for each analytical discipline and one (1) year of experience.

6.2.2.3 Technical Specialist Qualification Options for Exempting Education and Experience Requirements

a) Any person who was formerly recognized as a Technical Specialist (however named) based on requirements or exceptions in previous revisions of this Standard will continue to be eligible as Technical Specialist for the same analytical disciplines at any accredited laboratory. Appropriate records must be available to show previous recognition as a Technical Specialist.

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Commented [PJ23]: Seems like Associates Degre ... [14]

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Commented [PJ24]: Did Bob determine if this is ar ... [16]

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Commented [DB28]: From Jacksonville '25: Add th ... [20]

years of laboratory experience is eligible as Technical Specialist at facilities where the treatment plant operator's certificate is recognized and for the scope covered by that certificate.

c) If an AB provides an exemption other than those listed in a) and b), the laboratory must maintain the record of the exemption for the same time period as required for the data generated during the employment of that technical specialist.

d)

Commented [DB29]: From Jacksonville '25: Is this lab experience or experience as an operator? Or does it matter?

Commented [DB30]: Should we add analytical discipline to this experience?

Commented [DB31]: Review again after LAB meets in St. Louis.

Deleted: [insert language for Primary AB approval of exempted Technical Specialist]

Deleted: <#>Any person 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 to be eligible as Technical Specialist.¶
If a laboratory seeks accreditation for a method in a TNI-defined analytical discipline that is not currently on the laboratory's scope of accreditation, the person who is assigned responsibility for demonstrating performance of a method (installation documentation, method validation or verification, DOC, PT performance, etc.) is eligible to serve as Technical Specialist for that method.

Page 2: [1] Commented [DB8] **Bond, Debbie** **3/7/25 7:50:00 AM**

From Mike Michaud email 2/6/25: I think we need to consider adding a description to define it. Something similar to they must have experience in the area they will be responsible for or must have experience performing the methods they will be responsible for.

Page 2: [2] Commented [DB9R8] **Bond, Debbie** **4/14/25 1:04:00 PM**

The deputy will not have qualification requirements, so this is unnecessary.

Page 2: [3] Commented [DB10] **Bond, Debbie** **7/14/25 12:43:00 PM**

Consider including in Annex C some information on how a laboratory handles the TS (and maybe deputy) being unable to fulfill the role, even if the 15 days aren't met.

Page 2: [4] Deleted **Paul Junio** **6/11/25 9:06:00 AM**

Page 2: [5] Commented [DB13] **Bond, Debbie** **4/8/24 1:18:00 PM**

Ensure we are not requiring environmental experience where non-environmental will be just as valuable.

Page 2: [6] Commented [PJ14] **Paul Junio** **6/9/25 8:43:00 AM**

Requiring our own program and we need to be open to others. We've written a standard that allows us to profit from how it is written. Re-write to be less specific, yet allow other credential types.

Page 2: [7] Deleted **Bond, Debbie** **7/14/25 1:08:00 PM**

Page 2: [8] Deleted **Paul Junio** **6/11/25 8:54:00 AM**

Page 2: [9] Commented [DB17] **Bond, Debbie** **7/14/25 1:23:00 PM**

Consider adding to Annex C a link to the site that includes equivalency of different country's degrees to USA degrees.

Page 2: [10] Commented [PJ18] **Paul Junio** **6/9/25 9:21:00 AM**

This doesn't address an Associates Degree, but that's what the Technical Modules reference

Page 2: [11] Commented [BD19] **Bond, Debbie** **7/24/24 4:52:00 PM**

To qualify as a technical specialist, a candidate must have experience in the analytical disciplines for the area of responsibility and the education or training listed in one of the options listed below:

Page 2: [12] Deleted **Bond, Debbie** **7/21/25 12:07:00 PM**

Page 2: [13] Commented [PJ22] **Paul Junio** **6/9/25 9:34:00 AM**

bachelor's degree that includes STEM (Science, Technology, Engineering, Mathematics) courses.

Page 2: [14] Commented [PJ23] **Paul Junio** **6/9/25 9:25:00 AM**

Seems like Associates Degree ought to be the next step in this set of options. Why is a Bachelors Degree the same as a valid treatment plant operator's license (each need it plus 2 years of experience)?

Page 2: [15] Deleted **Paul Junio** **6/12/25 10:46:00 AM**

Page 2: [16] Commented [PJ24] **Paul Junio** **6/9/25 9:05:00 AM**

Did Bob determine if this is an ANSI conflict for us? Confer with Matt Sica and Nicolas Slawson

Page 2: [17] Commented [PJ25R24] **Paul Junio** **6/12/25 10:43:00 AM**

Not a conflict per Bob - delete TNI and we should be good.

Page 2: [18] Commented [DB26R24] **Bond, Debbie** **7/15/25 9:32:00 AM**

From AC (Kristin's email 7/15/25): this specialist credential would be best used as a possibility to make up for missing a course requirement, not as to meet the requirement for technical director qualification.

Page 2: [19] Commented [DB27] **Bond, Debbie** **3/12/25 1:57:00 PM**

From Jacksonville '25 (Elizabeth Lesold): Potential conflict because some TP Operator certification (b) and credentialing (c) may overlap enough to cause confusion. For b) must have experience; what about for c)?

Page 2: [20] Commented [DB28] **Bond, Debbie** **3/12/25 2:03:00 PM**

From Jacksonville '25: Add that appropriate records must be maintained to show previous recognition as TS."

5 Structural requirements

5.1 *The laboratory shall be a legal entity, or a defined part of a legal entity, that is legally responsible for its laboratory activities.*

NOTE For the purposes of this document, a governmental laboratory is deemed to be a legal entity on the basis of its governmental status.

5.2 *The laboratory shall identify management that has overall responsibility for the laboratory.*

5.3 *The laboratory shall define and document the range of laboratory activities for which it conforms with this document. The laboratory shall only claim conformity with this document for this range of laboratory activities, which excludes externally provided laboratory activities on an ongoing basis.*

5.4 *Laboratory activities shall be carried out in such a way as to meet the requirements of this document, the laboratory's customers, regulatory authorities and organizations providing recognition. This shall include laboratory activities performed in all its permanent facilities, at sites away from its permanent facilities, in associated temporary or mobile facilities or at a customer's facility.*

5.5 *The laboratory shall:*

a) define the organization and management structure of the laboratory, its place in any parent organization, and the relationships between management, technical operations and support services;

b) specify the responsibility, authority and interrelationship of all personnel who manage, perform or verify work affecting the results of laboratory activities;

c) document its procedures to the extent necessary to ensure the consistent application of its laboratory activities and the validity of the results.

5.5.1 The laboratory must have a plan and procedure for how the roles and responsibilities are filled when the personnel responsible for the laboratory, the review and release of analytical data, or the quality management systems, including review of quality control data, are absent. Refer to Sections 5.6.X and 5.X for specific absence requirements for Technical and Quality Specialists. The plan and procedure must define what processes may continue or be halted when those personnel are absent and what tasks can be accomplished by designated alternates (also called "deputies") and associated timeframes.

5.6 *The laboratory shall have personnel who, irrespective of other responsibilities, have the authority and resources needed to carry out their duties, including:*

a) implementation, maintenance and improvement of the management system;

b) identification of deviations from the management system or from the procedures for performing laboratory activities;

c) initiation of actions to prevent or minimize such deviations;

d) reporting to laboratory management on the performance of the management system and any need for improvement;

e) ensuring the effectiveness of laboratory activities.

5.6.3 The laboratory must have (a) Technical Specialist(s) to provide technical guidance to laboratory personnel for each TNI-defined analytical discipline associated with the laboratory's scope of accreditation. A single individual may be appointed as the Technical Specialist for one or more TNI-defined analytical disciplines and may also hold additional primary job responsibilities. The TNI-defined analytical disciplines are:

- Asbestos
- Inorganic Chemistry – Nonmetals
- Inorganic Chemistry – Metals
- Organic Chemistry
- Microbiology
- Radiochemistry – Gas Flow Proportional Counting
- Radiochemistry – Liquid Scintillation Counting

Commented [DB1]: From Jacksonville '25: all good as written

Commented [DB2]: Should this be capitalized? I updated the few lower case times to upper case.

Commented [NC3R2]: I don't really have a preference, but the title of quality specialist should follow whichever is chosen.

Commented [DB4]: Can this be simplified?

Commented [NC5R4]: Section re-wording recommendation:

The laboratory must have (a) technical specialist(s) to provide technical guidance to laboratory personnel for each TNI-defined analytical discipline associated with the laboratory's scope of accreditation. A single individual may serve as the technical specialist for one or more TNI-defined analytical disciplines and may have additional responsibilities. The TNI-defined analytical disciplines are:
-Asbestos
-Inorganic Chemistry - Nonmetals
-Inorganic Chemistry - Metals
-Organic Chemistry
-Microbiology
-Radiochemistry
-Whole Effluent Toxicity

I think the disciplines would be better presented as a list rather than within the paragraph.

- Radiochemistry – Alpha Spectrometry
- Radiochemistry – Gama Spectrometry
- Radiochemistry – Radon Emanation
- Whole Effluent Toxicity

Technical Specialist(s) must:

a) provide guidance and oversight to laboratory personnel as needed to ensure activities related to the generation of analytical data and test results, including but not limited to method development and validation, procedure development, sample preparation, instrument calibration, sample analysis, quality control, and data reduction, comply with the laboratory's quality management system and with relevant regulatory requirements for which the data will be used and

b) have the authority to halt work, repeat work, withhold reports, and resume work as part of the management of nonconforming work, as defined in 7.10.

5.6.4 A Technical Specialist may be appointed across multiple laboratories, subject to approval by the primary accrediting body. Requests for approval must include a plan outlining how the Technical Specialist will meet the requirements in section 5.6.3 across multiple locations. Records of the accrediting body's approval, including the approved plan, must be retained.

5.6.5 If a Technical Specialist is unable to fulfill the duties in sections 5.6.3 a) and b) for fifteen (15) consecutive calendar days,

a) a deputy must be appointed and assume the responsibilities of the technical specialist or

b) work in that analytical discipline must be halted or subcontracted to another qualified laboratory.

The deputy is not required to meet the qualification requirements of a Technical Specialist.

5.6.6 When a deputy assumes the responsibilities of a Technical Specialist, the laboratory must notify the primary accreditation body within sixty (60) days if a qualified Technical Specialist does not resume the responsibilities. The notification must be in writing and must include a plan with a timeline for appointing a qualified Technical Specialist.

6 Resource requirements

6.1 General

The laboratory shall have available the personnel, facilities, equipment, systems and support services necessary to manage and perform its laboratory activities.

6.2 Personnel

6.2.1 *All personnel of the laboratory, either internal or external, that could influence the laboratory activities shall act impartially, be competent and work in accordance with the laboratory's management system.*

6.2.2 *The laboratory shall document the competence requirements for each function influencing the results of laboratory activities, including requirements for education, qualification, training, technical knowledge, skills and experience.*

6.2.2.1 Technical Specialist Qualifications

The laboratory shall retain a record showing that each Technical Specialist meets the requirements of 6.2.2.2 or exceptions of 6.2.2.3. Where coursework is required, the laboratory must retain records that show courses were successfully completed (e.g., certificate, letter, transcript).

6.2.2.2 A Technical Specialist must meet one set of the following qualifications for each analytical discipline for which they are responsible, where the required experience is in the corresponding analytical discipline(s). In addition, analytical disciplines for Asbestos, Microbiology and Radiochemistry require a relevant technical course. Information on relevant technical courses can be found in Annex C.

a) a master's or doctoral degree and one (1) year of experience,

Commented [KD6]: I replaced responsibility with guidance and oversight. "responsibility to manage" by common definition implies the technical specialist has supervisory or management responsibility, which is not required. I think oversight is a better description of intent.
I also removed "key personnel" which I know is controversial. In some labs the TS may be key personnel. In a lab like PAS, a role is not key personnel until it is at the Director or Officer level, which the exception of the Quality Manager. We have 1 Chief Technical Officer for our 80+ labs and I think 4 Technical Directors. Tech Spec for TNI are usually bench analysts. Bench analysts are not involved in decisions that affect our business - they are not key personnel, the CTO is. Also the whole concept of key personnel is that here is a deputy to maintain - Section 5.6.5 essentially fulfills the intent of key personnel so I don't think the removal of the statement that TS are key personnel is significant.

Commented [DB7]: Ensure we are not requiring environmental experience where non-environmental will be just as valuable.

Commented [DB8]: Consider adding to Annex C a link to the site that includes equivalency of different country's degrees to USA degrees.

Commented [DB9]: We typically use "maintain records" is there a difference between maintaining and retaining? If so, which is correct and should this be a change throughout M2?

Commented [NC10R9]: I just ran across this in the chemistry module. I did a review of the ISO 17025 standard language, and when it comes to records, they always use the term retain, not maintain. It was something I was going to mention to you. We may want to switch to retain for consistency with ISO.

Commented [PJ11]: This doesn't address an Associates Degree, but that's what the Technical Modules reference

Commented [BD12]: To qualify as a technical specialist, a candidate must have experience in the analytical disciplines for the area of responsibility and the education or training listed in one of the options listed below:

Commented [DB13]: Do we need to include more specific information about these relevant technical courses somewhere?

Commented [NC14R13]: Either here or in the corresponding module. Don't know what "relevant technical course" means. How is this assessable?

Commented [DB15R13]: Add to see Annex C for information on relevant technical courses.

b) a bachelor's degree in a STEM (science, technology, engineering, or math) field and two (2) years of experience,
c) an associate's degree in a STEM field and three (3) years of experience,
d) four (4) college level STEM courses and four (4) years of experience, or
e) Technical Specialist credential for each analytical discipline and one (1) year of experience.

6.2.2.3 Technical Specialist Qualification Options for Exempting Education and Experience Requirements

a) Any person who was formerly recognized as a Technical Specialist (however named) based on requirements or exceptions in previous revisions of this Standard will continue to be eligible as Technical Specialist for the same analytical disciplines at any accredited laboratory. Appropriate records must be available to show previous recognition as a Technical Specialist.

b) Any person who is an 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 and has two (2) years of laboratory experience is eligible as Technical Specialist at facilities where the treatment plant operator's certificate is recognized and for the scope covered by that certificate.

c) If an accrediting body provides an exemption other than those listed in a) and b), the laboratory must retain the record of the exemption for the same time period as required for the data generated during the employment of that technical specialist.

Commented [PJ16]: Seems like Associates Degree ought to be the next step in this set of options. Why is a Bachelors Degree the same as a valid treatment plant operator's license (each need it plus 2 years of experience)?

Commented [PJ17]: Did Bob determine if this is an ANSI conflict for us? Confer with Matt Sica and Nicolas Slawson

Commented [PJ18R17]: Not a conflict per Bob - delete TNI and we should be good.

Commented [DB19]: From AC (Kristin's email 7/15/25): this specialist credential would be best used as a possibility to make up for missing a course requirement, not as to meet the requirement for technical director qualification.

Commented [DB20]: From Jacksonville '25 (Elizabeth Lesold): Potential conflict because some TP Operator certification (b) and credentialing (c) may overlap enough to cause confusion. For b) must have experience; what about for c)?

Commented [DB21]: From Jacksonville '25: Add that appropriate records must be maintained to show previous recognition as TS."

Commented [DB22]: From Jacksonville '25: Is this lab experience or experience as an operator? Or does it matter?

Commented [DB23]: Should we add analytical discipline to this experience?

Commented [DB24]: Review again after LAB meets in St. Louis.

Attachment E: QSM Action Item Summary – 2024/2025

Item	Task Description	Document Number	Contact	Task Added	Start Date	Complete Date	External Communications	Comments
1	Update V1M2	V1M2		Ongoing	Ongoing	Ongoing		See #6 – Review SIRs See #2 – Workgroups See #3 – Technical Specialist 12/10/23: Reviewing the DRAFT Standard and working on finalizing language that was inserted from work done by the various language workgroups and making sure language is properly placed in the new format. Additional language editing is being done through this review. The Summary of Changes/Justification document will be updated through this review process. The Committee is looking at changing the Quality Manager title to Quality Specialist. 1/8/24: Edited Data Integrity Section. 5/13/24: Started review of language again. Continued review of language June, July, August, September, October, November. 12/9/24: Finished up review of language and started review of Definitions. Considering how to handle extensive list – are all definitions needed? Work with Ilona and Paul before next meeting. 7/14/25: Review of the definitions has been completed. Some definitions are being removed, but some of those will now be in Expert Modules where only one expert module still needed it. Work

Item	Task Description	Document Number	Contact	Task Added	Start Date	Complete Date	External Communications	Comments
								has resumed on Technical Specialist language to prepare for St. Louis.
2	Develop Workgroups to work on language in specific section of the Standard.	V1M2		Ongoing	Ongoing	Ongoing	CLOSED	Language Workgroup tasks: – Internal Audits – Document/Record Retention – Quality Manual – Define "Appropriate QC" in Section 7.7 (ISO/IEC 17025:2017) – Consistent use of Procedure and Policy - Clarification of unique ID 2/6**/23**: Working on defining Technology. Will work with PTPEC, Chemistry and LAMS to further this work. 3/6/23: Working on records retention language. 4/11/23: Committee sending ideas for records retention language to Workgroup for consideration. 7/10/23: Language formulated is now being added to the DRAFT Standard. 8/11/23: The Definitions Workgroup presented information on definitions and there was a lot of discussion surrounding duplicate, replicate, records, policies and procedures (written). 9/11/23: A number of new workgroups have been formed to continue work on the standard. Workgroups now include: - Definitions (presenting 9/11/23) - Language (present Oct) – on Oct agenda - Data Integrity (present Oct) – delayed to Nov - Subcontracted Work (present Dec)

Item	Task Description	Document Number	Contact	Task Added	Start Date	Complete Date	External Communications	Comments
								- Measurement Traceability (present Dec) - Calibration Requirements (not started) - Handling Test Items (not started) 9/13/23: The Definitions WG has completed their task to evaluate ~12 terms and compose definitions, if needed, and review full V1M2 Draft for correct use of the term 'Procedure.' The update included the final items that no definitions for duplicate or replicate will make it into V1M2, and defining Procedure as "written" is not in conflict with any ISO 17025:2017 usage of procedure. 11/15/23: The WG for Subcontracting Work (V1M2 4.5.5) completed its task and the draft language is incorporated into Draft V1M2. Data Integrity WG (V1M2 4.2.8.1 & 5.2.7) is almost done but will need to review the most recently proposed additions to match up with QSM 6.0 V1M2. Workgroups Measurement Traceability (5.6), Calibration Requirements (5.5), and Handling Test Items (5.8) just launched this month and will begin tackling suggested edits to these sections. 12/11: Continued updates can be found above in the work for the Standard update since the Committee is now focused on reviewing language in the DRAFT Standard. WORKGROUPS HAVE COMPLETED THEIR WORK.

3	INITIAL Technical Specialist Language	V1M2		Ongoing	Ongoing	Ongoing	Complete	1/11/23: Worked on Exceptions. 2/13/23: Made updates based on conference comments. Working on language to make it clear current technical managers may continue as technical specialists for same areas of responsibility. 8/7/23: Technical Specialist status was reviewed at the Conference and comments ranged from concern that it still won't work for smaller labs to concern that the differing requirements between the Expert Committees makes it confusing. 12/10/23: Received a batch of recommended changes from NELAP AC. Debbie plans to talk to the NELAP AC about the changes. 2/12/24: The Committee started going through the table of recommended changes from the NELAP AC and included Committee Decisions that will be voted on after the table review is complete. 5/13/24: The table was completed in April and the results were presented in the minutes. The minutes and the decisions included were approved 5/13/24. Debbie will send out the comments relevant to the Expert Committees so they can start thinking about whether they need to update their Standard to include more Technical Specialist language. 9/9/24: Workgroup in August reviewed and Committee discussed during regular meeting. Experience requirement going to 1 year. QMS will set a minimum requirement and the Expert Committees

Item	Task Description	Document Number	Contact	Task Added	Start Date	Complete Date	External Communications	Comments
								can add more to their Standard if more is needed. 12/9/24: There will be a session in Jacksonville that will discuss concept of Analytical Disciplines and Technical Specialists.
4	Defining Technology (Analytical Disciplines)	Various TNI Standards	Paul Junio Tony Francis Debbie Bond	January 2023	12/11/23			1/11/23: Will work with Paul Junio's group to define Technology. PT, AB, QSM, etc. 12/11/23: Paul has started email communication on this topic, but the Workgroup has not met yet. 5/13/24: Need an update. Group has not met formally. September Update: CSDP EC is developing an Analytical Disciplines Workgroup. October: Workgroup began meeting. There will be a session in Jacksonville devoted to this topic. Will impact Training, Credentialing, and Technical Specialist.
5	Respond to SIRs	SIR 453 SIR 465		Ongoing	Ongoing	Ongoing	Lynn Bradley – LASEC PA	**3/13/23**: Responded to SIR 453 regarding quarterly calibration verification of manual repeating pipettes. 8/14/23: Responded to SIR 465 regarding Class A glassware.

Item	Task Description	Document Number	Contact	Task Added	Start Date	Complete Date	External Communications	Comments
8	Address NEFAP request for recommended language in Section 7.3.	V1M2 – Section 7.3	Tracy Szerszen-NEFAP Chair	7/10/23	7/10/23	1/24/24		7/10/23: Alternate language recommended to NEFAP. 12/10/23: Debbie will meet with NEFAP at the conference to look at the language. 1/24/24: Language was reviewed during the conference and placed into the DRAFT Standard.
10	Internal Audit		Ilona Debbie	12/10/23	12/10/23	2/13/24		12/10/23: Checklists were added to Internal Audit Database to internal audit can be performed. Scheduled for 1/4/23. 1/4/24: Audit performed by Debbie and Ilona. 2/12/24: Internal Audit shared with the Committee and Corrective Action was completed. Ilona will send to CSDP EC for final review . *(Addition: 2/13/24: Sent to Paul Junio and Bob Wyeth on 2/13/24.)*
11	Implementation Tool: Prepare a crosswalk for old vs new Standard.				TBD			6/20/24: Ilona noted that there is a crosswalk for the ISO language, but TNI language would need to be added. 7/14/25: Work in progress.
12	Respond to SIR 489	SIR 489		7/8/24	7/8/24	7/8/24		7/8: Committee approved response.
13	Respond to SIR 504	SIR 504		12/9/24	12/9/24	2/11/25		12/9/24: Complete SIR by email because no quorum on call.
14	Technical Specialist Language			7/14/25				7/14/25: Update from the CSDP EC and NELAP AC are being taken into consideration and language is being updated.