THE NELAC INSTITUTE

SOP TITLE	Educational Delivery System
SOP NO.	1-110
REVISION NO	3.0
PROGRAM	Administration

SOP Approval Dates

	Initial Approval	Last Revision Date	Last Review Date
Committee: Training	1/24/2011	6/18/2022	
Program	NA	NA	
Policy Committee Review	4/11/2011	7//7/2022	
TNI Board of Directors Endorsement	8/8/2011	NA (7/13/2022)	
Effective Date	8/8/2011	6/18/2022	

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 (EDS) is a comprehensive training system that utilizes various face-to-face and web-based types of training. In-person training courses, webinars, webcasts and on-demand education materials (referred to as "training courses"), are developed by TNI and training providers. The material is reviewed and approved by TNI, as appropriate, and then made available to TNI members and the environmental community. Training organizations may also post available courses on the EDS website.

3.0   Related Documents

Policy 1-101, Conflicts of Interest
SOP 1-117, Continuing Education Units
TNI Standard Training Procedure (STP) for Training Courses

4.0   Definitions

Term	Definition
Educational Delivery System (EDS)	TNIs training system that encompasses the various types of training defined below.
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 may be evaluated at the end of the training. − **In-Person Training Course:** A training course provided at a specific location and time with attendees present. − **On-Demand Education:** Learners can access educational information at any time. This training material includes webcasts and self-paced training material developed outside of webinars. − **Webinar:** On-line training course set-up for a specific audience at a specific time and may allow for interaction among the attendees. − **Webcast:** On-line material that can be accessed anytime and generally by anyone who is interested. Generally a webcast is a recorded webinar, but a webcast does not have to be a webinar first.
Continuing Education Units (CEU)	CEUs measure "participation in organized continuing education/training experiences under responsible, qualified direction and instruction." See SOP 1-117 Continuing Education Units.
Training Category	A descriptive term to define what type of course is being offered in order to market the course and to assign income and expense to the appropriate TNI budget codes.

5.0   Procedures

5.1   Roles of TNI

5.1.1   In TNI, Administration 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.

5.1.2   The EDS is supported by the TNI Training Coordinator, IT Administrator and Executive Administrator. It is also supported by the TNI Training Committee that helps develop a comprehensive training plan for TNI.

5.1.2.1 The Training Coordinator
- With the assistance of the Training Committee, develops a training curriculum consistent with TNI's strategic plan and issues Requests for Proposals (RFPs) for potential trainers;
- Assists trainers and attendees with technical issues with webinars.
- Provides trainers a list of registered attendees before the class;
- Provides course information for the Training Course Database as defined in the STP for Training Courses and forwards this information to TNI's IT Manager and Communications Coordinator.
- Develops marketing material;
- Provides input to trainers on delivery options and schedules educational events;
- Reviews and accepts training courses, see section 5.3
- Works with IT Administrator to provide a website for the EDS;
- Works with TNI committees and training providers to establish a comprehensive offering of training courses;
- Grades exams and provides certificates as needed for training courses; and
- Works with trainers to help develop courses through the review or coordination of the review of training materials and education on tools available to enhance the students learning experience.

5.1.2.2   The IT Administrator sets up the registration process, posts course information on the TNI website and makes the recorded webcast available. Note: Webcasts are organized into categories as discussed in Section 5.4 but may appear on the website under multiple categories. For example, the course *The New EPA MDL Procedure* appears in both the Technical and TNI Standard categories.

5.1.2.3   The Executive Administrator
- Processes any course registrations that come by email, fax, or phone;
- Creates attendee lists for each class for documenting who signed up for the class and to provide a final summary to the trainer;
- Summarizes the course demographics after the course is completed in the Training Course database;
- Maintains a summary of all webcasts purchased each fiscal year as described in the STP for Training Courses; and
- Tracks royalty payments.

5.1.2.4   The Training Committee helps to develop a comprehensive training plan for TNI through:
- Identifying training needs;
- Seeking trainers for needs identified;
- Developing basic course descriptions for Request for Proposals (RFPs);
- Supporting credentialing programs or training tracks;
- Providing input in the development of tools to support the EDS;

- Marketing training material; and
- Reviewing and recommending internal policies and procedures that support TNI's EDS..

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 seek assistance from committees to review related training material 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 as defined in the term "Training Course" in Section 4.

5.2.2   Training may be developed by TNI through the help of committees, 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 topic through an RFP mechanism. Such RFPs identify the scope of the training. In some cases, these courses are developed for a set fee with TNI maintaining ownership of the material. In other cases the RFP may give the provider the option to develop and own the material while 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 as needed. Attachment A contains an RFP template.

5.2.3.2   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.

5.2.3.3   A training organization may choose to partner with TNI by requesting that TNI include a course of theirs on the Available Training Courses listing on the TNI website (Educational Delivery System tab). A fee will be charged for this service.

5.3   Review and Acceptance of Developed Training

All trainings offered through the EDS must be reviewed. A TNI logo can only be used on TNI approved training that has undergone through a comprehensive review as described in Section 5.3.2.

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 B).

5.3.1.1   The training material will be reviewed by the Training Coordinator for consistency

with the course outline, editorial errors, and formatting. Additional suggestions may be made as appropriate. Training material is generally provided to the TNI Coordinator at least one week prior to the training date.

5.3.1.2 Training material developed by TNI will include the TNI logo on the material.

5.3.2 Training Developed by External Training Providers

A review process has been established for review of training courses that are owned by the Training Provider.

5.3.2.1 An online application must be completed with an attached detailed outline of the training being proposed (see Attachment B).

5.3.2.2 The Training Coordinator shall be sensitive to potential conflicts of interest when sharing any material submitted through the application process or during the review of training material. The provider will be contacted prior to the sharing of any material and confidentiality agreements will be completed by any reviewers requested to assist the Training Coordinator or TNI staff during any reviews (Attachment C)

5.3.2.3 The training proposal is reviewed by the Training Coordinator and the Executive Director to determine whether the proposal will be accepted for further review. If the training proposal is rejected, the Training Coordinator will notify the Training Provider of that decision.

5.3.2.4 Once the proposal is accepted, 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), group, or individuals are requested to review the material. The level of review depends on the risk to TNI and whether a TNI logo will be placed on the training material. Training material is generally provided to the Training Coordinator one week prior to the training date unless specified differently in the contract with the provider.

5.3.2.4.1 Where the instructor owns the material and takes responsibility for its contents and use of the TNI logo has not been requested, the material may only be reviewed for consistency with the course outline, editorial errors, and formatting. Additional suggestions may be made as appropriate.

5.3.2.4.2 If the TNI logo is requested, it must be reviewed for technical content.

5.3.2.5 A contract will be prepared for every training event offered by a Training Provider in cooperation with TNI. The contract will include financial agreements, due dates for training material, and address ownership of materials.

5.4 Training Categories

Training courses are organized into 10 categories as shown in the table below. The Codes in the table are used to track income and expense by program for financial reports for training courses. Unless an exception is made by the TNI Training Coordinator, all webcasts will use the training codes of 4121 and 7320. The categories are further described in the subsections below.

Note: Income and expense for training courses at TNI conferences are included with the conference budget and do not use the Codes below.

#	Category	Income Code	Expense Code
1	Assessor	4043	6321
2	Management	4121	7320
3	Field Activities	4154	7520
4	Quality Systems	4033	6120
5	Fundamental Laboratory Skills	4121	7320
6	Regulatory	4121	7320
7	Technical	4121	7320
8	TNI Laboratory Standard	4033	6120
9	Conference Learning	4121	7320
10	Other	4121	7320

5.4.1 Assessor: These courses are primarily intended for laboratory assessors but may be of interest to laboratory QA staff who conduct internal audits. The classes include both basic assessor and technical training for a specific scientific discipline such as microbiology.

5.4.2 Management: These courses are focused on the management activities of an organization (e.g., laboratory or FSMO) such as *Lowering the Cost of Poor Quality with an Effective Quality Management System*.

5.4.3 Field Activities: These courses are intended for Field Sampling and Measurement Organizations and focus on field measurements or sampling techniques. These courses also include training related to the FSMO standard.

5.4.4 Quality Systems: These courses address topics that would improve the Quality Management System of an environmental laboratory, such as *How Implementing a Quality Management System Improves Laboratory Data Quality and Performance*.

5.4.5 Fundamental Laboratory Skills: These courses are intended to teach laboratory and/or field analysts basic skills such as how to use an analytical balance or how to purchase laboratory equipment.

5.4.6 Regulatory: These courses are intended to explain a state or federal regulation such as the 2021 EPA Method Update Rule.

5.4.7 Technical: These courses cover advanced technical topics such as ion chromatography, instrument calibration, manual integration, or radiochemical analyses.

5.4.8 TNI Laboratory Standard: These courses provide basic or refresher training on specific language in the TNI standard. Examples include *Document and Document Control* and *Changes to the TNI Standard – Module 2 Quality Systems.*

5.4.9 Conference Learnings: A course that is a recording of a meeting presentation at a conference that has significant/substantial information that would be of interest to laboratories, FSMOs, ABs and others in the environmental community.

5.4.10 Other: Any course that does not fit into one of the other categories.

5.5 Marketing

5.5.1 Once a proposal is approved, the Training Course Database is completed to provide information to develop online registration and prepare a flyer for email marketing (see Section 5.5.4). This report is maintained in an access-controlled online site (e.g., Dropbox) for easy access by TNI staff as needed.

5.5.2   A flyer containing any upcoming training courses is distributed each month through email marketing. Courses that are developed for immediate release may also be sent out as an individual flyer.

5.5.3   Participation in social media forums may also be appropriate for marketing courses.

5.6   Registration

5.6.1   Events that require registration assistance are coordinated by TNI's Executive Administrator. Registration is provided on-line or by phone, fax or mailing.

5.6.2   If group registrations occur and certificates are purchased, the group contact must email the name and email address of each person receiving a certificate in their group who attended the course to the Training Coordinator. In addition, if the course offers a Certificate of Completion, a quiz must be completed by each participant and forwarded to the Training Coordinator in order to receive a certificate.

5.6.3   All paid attendees who did not log in to the assigned on-line platform for the training may request a webcast copy of the training. Requests must be sent to the TNI Training Coordinator. Additionally, students who attended the training may also request a copy of the recorded webcast for their personal use. This copy cannot be distributed.

5.7   Fees

Training fees may be established for any type of training.

5.7.1   TNI's Finance Committee approves a general fee schedule for similar types of TNI developed training. Minor changes are approved by the TNI Executive Director and major changes must be approved by TNI's Finance Committee.

5.7.2   Fees paid to trainers for training provided by an individual/organization in partnership with TNI are proposed by the trainer and negotiated with TNI.

5.7.3   TNI may establish group registrations with approval from the trainer. Group registration means that the webinar must be viewed by individuals who work at one location as a group. Patron members are the exception to this rule but must request multiple invitations from the Training Coordinator.
   a)   Group sizes are usually determined to be 5-10 students per group. An organization can purchase multiple group registrations if their group size is larger than 10.
   b)   Group pricing can be negotiated between the trainer, TNI and an organization that is looking for additional group discounts. This occurs infrequently.

5.8   Expiration and Renewal

5.8.1   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 or obsolete.

5.8.1.1 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.

Note: In some instances it may be appropriate for TNI staff to assist in updates of the training material.

    5.8.1.2 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.

  5.8.2 A contract may be renewed by extending a current contract or through submitting a new application on the TNI website.

5.9 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 performance and effectiveness of the instructor for providing additional classes. These evaluations are maintained by TNI.

5.10 Certificates

Certificates may be awarded for training events. Certificate types include Certificate of Attendance or a Certificate of Completion. A Certificate of Completion requires passing a test of at least 10 questions with a score of 70% or greater. TNI may set a fee for certificates or the cost of certificates may be included in the fee for the course.

5.11 Reporting

The TNI Training Coordinator provides the instructors with copies of attendee lists for all webinar and in-person training courses before the course is given. The Executive Adminstrator provides a final attendee list with payment information to the trainer after the course is given. Each quarter, the Executive Adminstrator provides instructors a listing of all individuals who purchased their webcasts showing royalty payments due.

6.0 Documentation

A summary of all courses in any given fiscal year is recorded in the Training Course Database. This summary includes the all information as described in the training course STP. Any Powerpoint presentation and related handouts are also retained.

A Master List of all webcasts that have been and/or are currently available in EDS are recorded in the webcasts database.

A summary of all webcasts in any given fiscal year are recorded in the webcasts database as described in the STP for Training Courses.

7.0 References

None

8.0   SOP Approved Changes

Revision No.	Effective Date	Description of Change
0	08/09/2011	New Document.
1	02/23/2017	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.
1.1	03/05/2017	Editorial changes made based on Policy Committee Review.
2.0	09/xx/2021	Extensive changes based on actual practice and TNI staff changes. Section 4 - deleted Workshop. Forum. Seminar, expanded CEU. Removed formula for calculating CEU. 5.1 changed title to roles of TNI and added Executive Administrator, IT Administrator and Training Committee; other minor edits Revised 5.1.2. Added 5.3.1.1 and 5.3.1.2; Revised 5.3.2; Added 5.4.1 to 5.4.10; Added 5.5.4 and 5.5.5. Added Attachment A; Revised Attachment D Updated course report form. Added sections 5.10, 5.11, and 6.0 Other minor edits.
3.0	07/08/2022	Eliminated the use for the Training Course Reports format and switched to the Training Course Database. Removed webcasts fron the traing course database and created a new approach where webcast information is stored in the fiscal year folder. Clarified the roles of the Training Coordinator and Executive Administrator. Revised category 5. Eliminated Appendix D and referenced the administrative Standard Training Procedure.

Attachment A.
Request for Proposal (RFP)

TNI Educational Delivery System (EDS)

BACKGROUND

The NELAC Institute (TNI) is a not-for-profit scientific voluntary consensus organization engaged in research and development whose mission is to be the leader in providing systems and processes to foster the generation of environmental data of known and documented quality through an open, inclusive, and transparent process that is responsive to the needs of the community. The organization is managed by a Board of Directors and is governed by organizational Bylaws.

TNI's vision is a true national accreditation program, whereby all entities involved in the generation of environmental measurement data within the United States are accredited to one uniform, rigorous, and robust program that has been implemented consistently nationwide and focuses on the technical competence of the entity pursuing accreditation. TNI believes such a program will improve the quality and reliability of environmental data used by federal and state agencies.

TNI is interested in contracting with individuals and organizations to provide training in specified topics. Training should impart knowledge with the goal that the person being trained will achieve some level of self-sufficiency with regard to the subject matter.

Proposals may be made to provide the training for only one course, or for multiple courses. Most courses are expected to be offered online using Webinar tools with TNI staff support.

SCOPE OF WORK - TRAINING COURSES

TNI is seeking trainers (contractors) to provide a training course as described in the example below:

Example 1 – Specific Course

Tools to Calculate and Evaluate Measurement Performance

The objective of the seminar is to present review the methods for calculation and evaluation of measurement performance indicators in the environmental chemistry laboratory. Topics include the common terms for data quality indicators used by laboratories to assess measurement performance within batches, between batches and for reported results. The seminar presents the formulas and calculations used and the methods for evaluating these data quality indicators. Students will be asked to calculate these parameters and evaluate the data calculated.

Example 2 – General

TNI is seeking trainers (contractors) to provide formal training courses that can be anywhere from an hour to a full day or even a multiple course series over a number of months. Most courses will be offered online, but proposals for onsite training will be considered.

FURNISHED EQUIPMENT, PROPERTY, OR INFORMATION

The following items will be provided by TNI:
- ☐ Outline and Synopsis review for suitability, not content;
- ☐ Course posted on TNI website and announcement emailed to TNI database;
- ☐ One-on-one training on use of Webinar tools;
- ☐ Set-up webinar – including invitations and uploaded documents. Set-up is based on Webinar

       Proposal/Application completed by trainer;

☐   Staff support as agreed upon in contract;

☐   PowerPoint slides to train attendees on use of tools at training start-up;

☐   Online course evaluation survey;

☐   Online registration and collection of fees;

☐   Attendance records for online courses;

☐   Listing of registered attendees 1 week prior to the course; and

☐   Training certificates as purchased by attendees or as otherwise negotiated in the contract.

DELIVERABLE REQUIREMENTS

Contractor shall supply the agenda for the course, learning objectives and a copy of course materials provided to students. Contractor shall retain all intellectual property rights for the course materials. Contractor shall provide all travel and on-site costs and supply documentation of attendance records for on-site courses.

PROPOSAL FORMAT

Interested contractors should complete a proposal/application and provide the requested information. The proposal/application includes the following elements:

☐   A description of the training being proposed;

☐   Information about format and date(s) if known;

☐   Biography;

☐   Course outline and a synopsis; and

☐   A detailed cost proposal that satisfies the requirements specified in the pricing section below.

PROPOSAL DUE DATE

Proposals/applications must be received at TNI by midnight EDT, mm/dd/yyyy. Proposals/applications shall be submitted online using the TNI Educational Delivery System Proposal/Application System (http://nelac-institute.org/content/eds-app.php).

PRICE

Nothing herein shall be construed to commit TNI to pay any costs incurred by bidders in connection with preparation of a proposal, or to guarantee the procurement of any services. All prices are to be in U.S. dollars. Contractor shall furnish and provide all material, labor, supervision, equipment, and incidentals required for accomplishing the work covered by the Contract, except the work, materials, services, or equipment to be furnished by TNI. The proposal should include any fees for instructor, materials, and instructor(s) travel being requested.

TNI and the contractor may mutually agree to cancel the class(es), if fewer than 10 students are registered one (1) week before the course date.

EVALUATION CRITERIA

TNI will review all proposals that are received by the deadline in accordance with the following criteria:
- ☐ Relevance of proposal to TNI's objectives and priorities;
- ☐ Technical merit;
- ☐ Competency of the proposed staff;
- ☐ Feasibility of the proposal;
- ☐ Adequacy of the applicant's resources; and
- ☐ Cost.

The anticipated award date for any contracts is Month Day, Year.

PAYMENT TERMS

Payment to the contractor will be on the 15th of the month following the course.

EXCEPTIONS, EXCLUSIONS, OR SPECIAL CONDITIONS

This solicitation permits the bidder to impose exceptions, exclusions, or special conditions. However, the bidder is hereby advised that any such exception, exclusion, or special condition may render your proposal non-responsive, which would preclude an award to you. Any exception, exclusion, or special condition the bidder wishes to include or impose must be fully and completely described in a written attachment to the Bidder's proposal.

TNI reserves the right to accept training proposals that are outside of the scope of this RFP.

ACCEPTANCE OF PROPOSALS

TNI reserves the right to cancel this RFP or to not consider bids submitted in response to this solicitation.

Attachment B Online Training Application for Proposals

Example Proposal/Application to Provide Training

An overview of TNI's training program can be found in SOP 1-110 - TNI Training: Educational Delivery System. Information in this document will help you complete this application. Contact TNI's Training Coordinator with any questions.

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?

__   In-Person
__   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, unless the training provider grants an exception. 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 C
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 TNI's Training Coordinator 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

_____
Signature/Date