

POLICY TO ASSURE THE COMPETENCY OF ORGANIZATIONS CONDUCTING  
ENVIRONMENTAL INFORMATION OPERATIONS AND GENERATING ENVIRONMENTAL  
INFORMATION UNDER AGENCY-FUNDED ASSISTANCE AGREEMENTS

*Agency Policy Directive Number FEM-2012-02*

*Revision 1 – Approved: March 13, 2013; Updated: December 21, 2016*

*Updated: August 25, 2025*

PURPOSE

This document establishes the U.S. Environmental Protection Agency's (EPA's or agency's) policy requiring organizations (e.g., laboratories, field sampling and measurement organizations) conducting environmental information operations<sup>1</sup> and generating environmental information under certain Agency-funded assistance agreements<sup>2</sup> to submit documentation of their competency prior to award of the agreement. This may include participation in applicable certification and/or accreditation programs.

EFFECTIVE DATE

This Policy is effective for five years from August 25, 2025. The Policy shall be reviewed prior to its five years effective term, and will either be reissued without revision, reissued with revisions, or rescinded.

DEFINITIONS

Accreditation – As defined by the International Organization for Standardization (ISO) <https://www.iso.org/certification.html>, accreditation is the formal recognition by an independent body, generally known as an accreditation body, that a certification body operates according to international standards.

Assistance agreement – An assistance agreement is the legal instrument of financial assistance between the EPA and a recipient to transfer anything of value to carry out a public purpose and not to acquire property or services for the EPA's direct benefit or use. It is either a grant or a cooperative agreement and will specify certain things including budget and project periods; the federal share of eligible project costs; a description of the work to be accomplished, and any terms and conditions. The terms grant and cooperative agreement are defined at 2 CFR 200.1.

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<sup>1</sup> As defined in the *US Environmental Protection Agency Environmental Information Quality Policy* (CIO 2105), environmental information operations are a collective term for work performed to collect, produce, evaluate, or use environmental information and the design, construction, operation or application of environmental technology.

<sup>2</sup> Interagency agreements were included in the original policy but removed in revision 1. The Office of General Counsel determined that the EPA would not have to perform a competency review of another federal agency w since all agencies must comply with fiduciary management rules and regulations.

Certification – As defined by the ISO (<https://www.iso.org/certification.html>), certification is the provision by an independent body of written assurance (a certificate) that the product, service or system in question meets specific requirements.

Competence – The demonstrated ability to apply knowledge and skills. Some examples for specific discipline areas can be found using the ISO Online Browsing Platform (OBP), Terms & Definitions, <https://www.iso.org/obp/ui>.

Environmental information – As defined in the EPA Quality Policy (CIO 2105), environmental information includes data and information that describe environmental processes or conditions which support EPA's mission of protecting human health and the environment. It refers to the array of data that individuals use to make decisions related to problem-solving (e.g., reports, audits, analyses, records, and studies).

#### APPLICABILITY

This Policy applies to all EPA programs (e.g., Program Offices, Regional Offices, and Laboratories) responsible for evaluating, issuing, and/or managing Agency assistance agreements involving organizations generating or using environmental information. It applies to new competitive and non-competitive awards that at the time of solicitation issuance or award are expected to exceed \$200,000 in federal funding in total maximum value (including any amendments).<sup>3</sup> This is an additional award requirement to be implemented by the project officer(s) and overseen by the project officer(s) or their technical designee(s). This Policy does not replace any existing requirements (e.g., general information, quality program requirements documentation) or prohibit an Agency program from placing additional requirements or stipulations on an organization receiving an award. Project officers are responsible for implementing the requirements under this Policy and ensuring that appropriate solicitation provisions and programmatic terms and conditions, if necessary, are included in solicitations and assistance agreements.

This Policy applies to:

- Awards made under competitive solicitations that are expected to exceed \$200,000 in federal funding in maximum total value and involve the use or generation of environmental information; and
- Non-competitive assistance agreements that are expected to exceed \$200,000 in federal funding in total maximum value and involve the use or generation of environmental information.

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<sup>3</sup> While this Policy does not apply to awards under the dollar threshold, offices are encouraged to apply this Policy to those awards as deemed appropriate.

## BACKGROUND/AUTHORITY

The EPA Science Policy Council, reconstituted in July 2010 as the Science and Technology Policy Council (STPC), established the Forum on Environmental Measurements (FEM or the Forum). During its tenure as a standing committee from 2004 – 2019, it was a primary goal of the Forum to promote national accreditation. Accreditation is a means to ensure that organizations are technically competent and have effective Quality Program management, enabling them to generate valid environmental information. After years of working with communities that operate accreditation programs and encouraging private, public, and State programs to be accredited, the Agency issued a policy to assure the competency of EPA laboratories in 2004. The document may be found at:

<https://www.epa.gov/measurements-modeling/measurement-competency-documents>.

Another FEM goal was consistency with other federal agencies' accreditation practices. This policy was developed to promote the use of accredited organizations, if available, for any applicable work performed. This policy also does not replace any requirements, such as general assistant agreement information or quality assurance documentation, nor does it prohibit an Agency program from placing additional requirements or stipulations on an organization to meet the needs of the work being sought.

While the FEM was dissolved in 2019, in 2025, the STPC convened and charged an ad hoc working group to review the policies, and either reaffirm or revise them, as appropriate. As a result, this policy is being reaffirmed.

## REQUIREMENTS

Recipient organizations performing activities involving the use or generation of environmental information under covered assistance agreements shall provide the Agency with demonstration of competency in the field(s) of expertise.

Demonstration of competency may include (but not be limited to):

- Current participation in accreditation or certification programs that are applicable to the environmental information generated under the Agency-funded assistance agreement.
- Ongoing participation by the recipient organization in proficiency testing (PT) or round robin programs conducted by external organizations.
- Ongoing U.S. EPA accepted demonstrations and audits/assessments of proficiency; and Other pertinent documentation that demonstrates competency (e.g., past performance to similar statement of work [SOW]).

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<sup>4</sup> See <https://www.epa.gov/measurements-modeling/ensuring-measurement-competency>

<sup>5</sup> See <https://www.epa.gov/quality/quality-program-directives>

Assistance agreement solicitations and agreements will include applicable provisions and terms and conditions.

## IMPLEMENTATION

Competitive awards and solicitations: Program offices that issue competitive solicitations expected to result in awards exceeding \$200,000 in federal funding in total maximum value that will involve the generation or use of environmental information must include a provision in the solicitation indicating that applicants for these awards must demonstrate competency (i) prior to award or (ii) if that is not practicable or will unduly delay the award shall demonstrate competency prior to beginning such activities under the award. For awards covered by (i) above where the Project Officer obtains the competency demonstration prior to award the Project Officer will include the demonstration in their grant file. For awards covered by (ii) above, where the competency demonstration will be made after award, the Project Officer must include a programmatic term and condition in the grant requiring the recipient to demonstrate competency prior to performing any work involving the use or generation of environmental information. This competency demonstration must be documented in the project officer's grant file.

Non-competitive awards: Program offices that make non-competitive awards expected to exceed \$200,000 in federal funding in total maximum value that will involve the generation or use of environmental information should ensure that the applicant demonstrates their competency to perform such activities prior to award. This will be documented by the Project Officer in their grant file.

However, if obtaining the competency demonstration prior to award is impracticable or will cause a significant delay of the award, project officers must include a programmatic term and condition in the grant requiring the recipient to demonstrate competency prior to performing any such activities. This competency demonstration should be documented in the project officer's grant file.

Note: Project officers must ensure that the following programmatic term and condition is included in awards (made after October 1, 2013) exceeding or expected to exceed \$200,000 in federal funds that will or are expected to involve the generation or use of environmental data.

## REFERENCES

- US EPA Grants and Debarment, <http://www.epa.gov/ogd>.
- EPA CIO 2105 *Environmental Information Quality Policy*, <https://www.epa.gov/quality/quality-program-directives#policy>
- EPA CIO 2105-P-01 *EPA Environmental Information Quality Procedure*, <https://www.epa.gov/quality/quality-program-directives#policy>
- FEM Lab Competency and Accreditation Policies, <https://www.epa.gov/measurements-modeling/ensuring-measurement-competency>.
- International Organization for Standardization, Online Browsing Platform (OBP),

Terms & Definitions, <https://www.iso.org/obp/ui>.