



Qualification of National Board Team Leaders and National Board Representatives

**THE
NATIONAL
BOARD**
OF BOILER AND
PRESSURE VESSEL
INSPECTORS

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Qualification of National Board Team Leaders and National Board Representatives

1.0 GENERAL

The purpose of this document is to define requirements for the qualification of individuals who function as National Board Team Leaders and National Board Representatives for performing accreditation reviews, audits, surveys and similar activities.

1.1 National Board Representatives are defined as individuals who are qualified to perform (1) reviews, (2) valve selections, (3) test witnessing or any combination of these functions. Where there are differences in the requirements for qualification for any of these functions, such differences are noted.

2.0 QUALIFICATION

In order to qualify as a National Board Team Leader or Representative, the individual shall meet the requirements of 2.1 through 2.5.

2.1 Education and Experience

The prospective National Board Team Leader and Representative shall have a minimum of ten credits that have been accumulated under the following system to qualify for the conduct of shop reviews, audits or surveys, or a minimum of seven credits to qualify for the conduct of valve selections and test witnessing.

2.1.1 Education (4 credits maximum)

2.1.1.1 High School diploma or equivalent: **score 1 credit.**

2.1.1.2 When the applicant has continuing education (7.0 CEU=s minimum) in mathematics, quality assurance, engineering, non-destructive testing or inspections: **score 1 credit.**

2.1.1.3 An associate or bachelor=s degree from an accredited college or university (give name and location of school): **score 1 credit.**
[Either (a) or (b) may be taken; not both.]

(a) if the degree is in physical sciences, mathematics, or quality assurance/control: **score 1 additional credit for a total of 2 credits.**

(b) if the degree is in engineering: **score 2 additional credits for a total of 3 credits.**

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2.1.1.4 The sum of 2.1.1.1 plus 2.1.1.2 plus 2.1.1.3 [including 2.1.1.3 (a) or 2.1.1.3 (b) but not both] may be used toward the 4 credits maximum for education.

2.1.2 Technical Experience (8 credits maximum)

2.1.2.1 Technical experience in engineering, manufacturing, construction, operation, maintenance, or inspections associated with boilers, pressure vessels and/or pressure relieving devices.

- (a) Each full year of experience: **score 1 credit per year with 5 credits maximum.**
- (b) If three years of the experience in 2.1.2.1 (a) have been working with ASME Boiler and Pressure Vessel Code Sections: **score 1 additional credit.**
- (c) If two years of the experience in 2.1.2.1 (a) have been in quality assurance/control: **score 2 additional credits.**

The sum of (a) plus (b) plus (c) may be used for technical experience.

2.1.3 Professional Accomplishments (2 credits maximum)

2.1.3.1 For certification of competency in engineering, science, inspection or quality assurance/control which is issued and approved by a government agency, or by a National Professional or Technical Society: **score 1 credit.**

2.1.3.2 For professional registration in one or more states: **score 1 credit.**

2.1.4 Management Evaluation (2 credits maximum)

Upon recommendation from the individual's employer, the National Board may award up to two credits for other performance factors applicable to reviews, audits, inspections and other activities which may not be explicitly called out in these criteria. Examples of these factors are leadership, judgement, maturity, analytical ability, past performance, and teaching at technical schools, seminars or courses: **score maximum of 2 credits.**

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2.2 Training

2.2.1 A prospective National Board Team Leader or Representative shall have training sufficient to develop competency in reviews, audits, surveys or similar activities in accordance with National Board policies and procedures and have attended the National Board Seminar for Team Leaders and National Board Representatives.

2.2.2 Training shall be based on the criteria described in 2.2.2.1 through 2.2.2.4.

2.2.2.1 Knowledge and understanding of the National Board Inspection Code, ASME Boiler and Pressure Vessel Code Sections I, IV and VIII (Divisions 1 & 2) and X, and/or other codes or related standards and regulations as applicable;

2.2.2.2 knowledge and understanding of the general structure and applicable elements of quality control;

2.2.2.3 procedures and techniques of auditing, questioning, evaluating, reporting, methods of identifying and following up on review items, and closing out review findings; and

2.2.2.4 training shall include the fundamentals and conduct of a review, visit for production valve selections, or test witnessing as applicable.

2.3 Activity Participation

2.3.1 The prospective National Board Team Leader or Representative shall be assigned with a qualified National Board Team Leader or Representative to participate in a minimum of three reviews or visits of the type for which qualification is being sought within a one year period, except as provided below.

2.3.1.1 For qualification to conduct laboratory and authorized observer acceptance reviews, the individual must be a National Board Test Laboratory Authorized Observer, qualified to conduct reviews and shall participate with a qualified National Board Representative during one laboratory review.

2.3.1.2 For qualification to witness testing, the individual must be a National Board Test Laboratory Authorized Observer (or have completed a special department training course to witness testing), qualified to conduct valve

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selections, and shall participate at least once with a qualified National Board Representative to witness testing at an accepted laboratory.

2.3.2 The prospective National Board Team Leader or Representative shall complete a Qualification Review Report (QRR), or the report required for the activity being reviewed for one of the reviews required. This report shall be submitted to the qualified National Board Team Leader or Representative.

2.3.3 The qualified National Board Team Leader or Representative shall appraise the prospective National Board Team Leader=s or Representative=s performance, including a review of the QRR, completed as described in Paragraph 2.3.2 for content, completeness and accuracy. The qualified National Board Team Leader or Representative shall submit a written evaluation of the prospective National Board Team Leader or Representative.

2.4 Communication Skills

The prospective National Board Team Leader or Representative shall have the capability to communicate effectively, both orally and in writing.

2.5 Examination

2.5.1 The prospective National Board Review Team Leader or Representative, who will conduct reviews, shall pass a written examination with a grade of at least 70%, which shall evaluate the prospective National Board Review Team Leader=s or Representative=s comprehension and ability to apply the training fundamentals identified in 2.2.

2.5.2 The development and administration of the examination shall be carried out in accordance with National Board guidelines.

2.6 National Board Team Leader or Representative Qualifications Application

2.6.1 The application for National Board Team Leader or Representative shall be submitted on forms prepared by the National Board.

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3.0 MAINTENANCE OF QUALIFICATION

- * 3.1 National Board Review Team Leaders or Representatives shall maintain their proficiency by participating in at least one review, valve selection process, or valve test observation or similar activity as appropriate with the qualifications, every twelve months.
- * 3.2 Each National Board Representative, at least once every two years, is required to attend a refresher course to review revisions and changes that affect quality programs, auditing methods, new technologies, the NBIC, the ASME Code or related subjects.
- * 3.3 National Board Review Team Leaders will be provided with refresher instructional materials as needed to maintain their proficiency. The refresher materials may include revisions and changes that affect quality programs, auditing methods, new technologies, the NBIC, the ASME Code or related subjects. The method of conveyance will be at the National Board's discretion.

4.0 REQUALIFICATION

- * 4.1 National Board Review Team Leaders or Representatives who fail to maintain their proficiency in accordance with paragraph 3.1 shall require reevaluation. Reevaluation is the direct observation of the individual by a qualified National Board Team Leader or Representative. Reevaluation must be accomplished within six months from expiration of the twelve month proficiency maintenance period.
- * 4.2 National Board Review Team Leaders or Representatives who fail to be reevaluated in the six month period described in paragraph 4.1 or whose certification has lapsed, shall require re-qualification. Re-qualification includes retraining in accordance with paragraph 2.2 and the activity participation described in paragraph 2.3.

5.0 WAIVERS AND EXCEPTIONS

When the requirements of this document are impractical to implement, the Executive Director, with the concurrence of the Chairman of the Board of Trustees, may allow exceptions on a case by case basis.