

## PNL ADMINISTRATIVE PROCEDURE

TITLE: PAP-204, LABORATORY TRAINING COORDINATION

### 1.0 OBJECTIVE

The purpose of this procedure is to expand upon PAP-201, Indoctrination and Training, by establishing the function of the Laboratory Training Coordinator and establishing a quality-related training system for Pacific Northwest Laboratory (PNL). The laboratory training function and the training system development (TSD) process will provide PNL with an auditable training system. The TSD process is widely recognized in industry and government, including NRC and INPO, as a manageable system which assists in assuring that training is adequate for requirements, is current with change and is auditable/documented.

### 2.0 APPLICABILITY

When this procedure is selected for implementation by a QA plan prepared and approved in accordance with PNL-MA-60, Quality Assurance Manual for License-Related Programs, this procedure is applicable to training of PNL staff who perform activities covered by PNL-MA-60 and the PNL Quality Assurance Program.

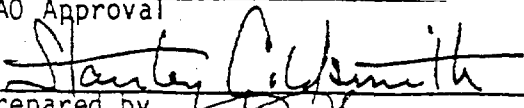


This procedure outlines the requirements for:

- a) Indoctrination of PNL staff
- b) Training of staff in all departments having responsibilities for performing or supporting license-related activities
- c) Documentation of indoctrination and training activities
- d) Organization and operation of a Laboratory Training Coordination function.

This procedure delineates:

- a) The method for establishing training requirements
- b) The use of standard planning to determine training needs
- c) Scheduling, administering and documenting training activities.

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WM-16 PDR

QA0 Approval 		Approved (Director, PNL)	
Prepared by P. P. Snorek 		Technical Review 	
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Specific instructions for implementing this procedure are contained in TCP-201, Coordinating and Scheduling of Training; TCP-202, Collection and Maintenance of Training Records; TCP-203, Laboratory Training Coordination Assessment Program; and TCP-204, Lesson Plan Preparation and Approval.

### 3.0 DEFINITIONS

- 3.1 Training System Development (TSD) - An organized approach to managing, controlling and documenting performance-based training. TSD includes analysis, design, development, implementation and evaluation phases of training.
- 3.2 Required Training - Training that is prerequisite and/or a continuing necessity for work on license-related projects. This training includes technical/nontechnical dictated by the needs of a job/position and training to procedures or revisions, policy, project work scope and regulatory changes.
- 3.3 Formal Classroom Training - Scheduled training that takes place at project and department levels with an approved lesson plan and qualified trainer.
- 3.4 On-The-Job Training - Hands-on training for a specified period of time under the supervision of a qualified staff member for the purpose of gaining experience and demonstrating capability to perform the work. It may also include intradepartmental work sessions and demonstration training under direction of a qualified supervisor/trainer.
- 3.5 Briefings - Usually unscheduled and informal discussions involving project-related procedures not covered by a formal lesson plan.
- 3.6 Required Reading - Reading assignments designated by cognizant project/line managers, such as procedures, manuals, regulations or other written information pertaining to a job/position.
- 3.7 Certification (staff) - The action of determining, verifying, and attesting in writing to the qualifications of staff members.
- 3.8 Evaluation/Assessment - An on-going process used to evaluate training courses for the purpose of identifying and documenting recommendations and concerns of training and course materials so that quality and consistency in training can be ensured.
- 3.9 Qualification - The characteristics or abilities gained through education, training, or experience, as measured against established requirements, such as standards or tests, that qualify an individual to perform a required function.

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- 3.10 Generic (program) - Training needs as they relate to or are characteristic of the whole group or class within a particular occupational activity or function.
- 3.11 Training Matrix - Predetermined staff training requirements developed through the continuing process of job/analysis and evaluation/assessment.
- 3.12 Work History Exemption - A justification to establish exemption or waiver from a required training course.
- 3.13 Job Analysis - The process of identifying the technical and administrative requirements, skills, and conditions of a job/position in order to determine specific training requirements.

### 4.0 RESPONSIBILITIES

#### 4.1 Communications Department Manager

- Develop and provide administration of the Laboratory Training Coordination function associated with license-related activities.
- Develop policies and procedures for management and coordination of license-related training.
- Maintain liaison with the Quality Achievement Office (QAco) during development of training coordination function. Upon completion of functional development, turn over operation to QAco.

#### 4.2 Publishing and Training Coordination Section Manager

- Manage Laboratory Training Coordination function during development.
- Develop guidelines for implementing related policies and procedures affecting license-related training activities.

#### 4.3 Project/Line Managers

- Establish training requirements, using the training matrix and job analysis process, for jobs/positions within the organization or area of responsibility. Ultimate responsibility rests with the project/line manager for determining training requirements for staff members to fully accomplish assigned tasks.
- Obtain one-over-one concurrence (i.e., section or department manager) of established training requirements.
- Identify training courses for development and assign trainers to conduct the courses.

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- Ensure that assigned trainers meet qualification for conducting training courses.
- Ensure that all required training is documented and records provided to Laboratory Training Coordination.
- In conjunction with the Laboratory Training Coordinator, review and assess the effectiveness of training activities.

### 4.4 Service/Support Function Managers

- Establish training requirements for staff within functional area of responsibility, in accordance with responsibilities identified under Section 4.3, Project/Line Managers, and Section 5.0, Procedure.

### 4.5 Laboratory Training Coordinator

- Operate Laboratory Training Coordination in accordance with established procedures and policies.
- Assist project/line managers with identifying training requirements.
- Using information accumulated from training assignments prepared by project/line managers, develop a training requirements matrix by job/position.
- Manage the training records system to ensure required documentation is retained for all training activities including attendance records, approved lesson plans, course evaluations, training appraisals, and other required records.
- Assist assigned trainers in lesson plan development and update. Review and approve lesson plans for form and consistency.
- Establish and maintain an automated records system to provide up-to-date information on planning, scheduling, and training activities status.
- With cognizant project/line managers evaluate training effectiveness through an assessment process.

### 4.6 Assigned Trainers (Classroom Training)

- Plan, prepare, and present lesson plans for assigned training sessions with assistance and support from the Laboratory Training Coordinator.

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### 4.7 Laboratory Staff

- Attend scheduled training as required by the cognizant project/line manager.
- Document attendance by signing Training Attendance Forms.

### 4.8 Quality Achievement Office

- Upon completion of development and transfer of Laboratory Training Coordination from Publishing and Training Coordination Section of Communications Department, assume management of the function.

## 5.0 PROCEDURE

### 5.1 Orientation

Laboratory Training Coordination, in coordination with QAcO, shall develop a generic PNL Quality Assurance (QA) Orientation Program. This program will be a basic QA course to introduce concepts and the policy/philosophy of quality-related activities at PNL.

### 5.2 Determining Training Requirements

- 5.2.1 Before a project begins and/or before staff are assigned from line or service/support organizations, the cognizant project/line manager shall identify all job/positions to be performed. The project/line manager shall list these job/positions on a Training Matrix Form (Exhibit 1).
- 5.2.2 For the job/positions listed, the project/line manager shall identify the minimum training requirements for each job/position, based on the approved master laboratory training matrix maintained by the Laboratory Training Coordinator (see Section 5.4). Through job analysis, project/line managers shall establish additional training requirements commensurate with the technical or departmental procedures and QA plans applicable to the project or activity, as prescribed in PAP-201, Indoctrination and Training, and obtain one-over-one concurrence of the section or department manager.
- 5.2.3 The cognizant project/line manager shall prepare Training Assignment Forms (Exhibit 2) for individual staff and indicate target date for completion of training either prior to job performance or during job performance. The Laboratory Training Coordinator is available to assist project/line managers in developing and determining training requirements and to provide information on past training history for staff members.

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- 5.2.4 Waivers of prescribed training requirements may be initiated by the cognizant project/line managers in accordance with paragraph 5.10 of this procedure.
- 5.2.5 A copy of each completed Training Matrix and Training Assignment Form shall be forwarded to Laboratory Training Coordination for incorporation into the individual training records and for coordination and assistance with scheduling of required training courses.

### 5.3 Types of Training

This procedure recognizes four types of training.

- 5.3.1 Classroom training shall be used to convey concepts and information to groups of individuals in accordance with an approved lesson plan. Classroom training is used where large amounts of detailed information must be presented and where feedback, in the form of discussion or examination, is desired in order to determine the extent of understanding of the presentation. Assignment and completion of classroom training shall be documented on the Training Assignment Form (Exhibit 2, Page 1 of 2).
- 5.3.2 On-the-job-training (OJT) shall be used whenever the trainee is required to demonstrate proficiency in a process or skill or where supervised experience in the process is determined to be necessary prior to allowing the individual to work independently. OJT shall be administered using a lesson plan or outline prepared and approved in accordance with TCP-204, Lesson Plan Preparation and Approval. Assignment and completion of OJT shall be documented on the Training Assignment Form (Exhibit 2, Page 2 of 2) under Other Training Required.
- 5.3.3 Briefings shall be used in situations where the project/line manager determines that the amount of material to be presented does not justify a formal classroom session or lesson plan, as in a change to a procedure, or where simple instructions in a process or operation are required. Briefing sessions shall be documented on the Briefing Documentation Form (Exhibit 3).
- 5.3.4 Required reading assignments shall identify required reading/study of the applicable codes, standards and technical and administrative procedures and subsequent revisions. Reading assignments shall not be used as a substitute for required classroom training. Required reading assignments shall be documented on the required reading list of the Training Assignment Form (Exhibit 1, Page 2 of 2).

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### 5.4 Development of Master Training Matrix

- 5.4.1 The job/task lists developed by project/line managers shall be used by the Laboratory Training Coordinator to develop a composite laboratory-wide job/task list by position, a form of job analysis.
- 5.4.2 The job/task lists will be analyzed and collated by the Laboratory Training Coordinator in terms relative to PNL-MA-60 and the established procedures. From this evaluation, a recommended master training matrix will be developed for each job/position. Training requirements will identify minimum training courses such as GEN-1, GEN-2, and other indoctrination required for the job/position.
- 5.4.3 The recommended master training matrix developed by the Laboratory Training Coordinator will then be reviewed by cognizant project/line managers and OAD for approval/concurrence. The initial master training matrix will be reviewed by the manager of Publishing and Training Coordination Section and the manager of Communications Department. Final approval authority for this master training matrix will be designated by the Director of PNL. Subsequent changes will be generated by the assessment/evaluation process. The approved master training matrix shall become PNL's baseline document for minimum training requirements for license-related activities.

### 5.5 Assignment and Qualification of Trainers

- 5.5.1 Cognizant project/line managers shall assign trainers to conduct training in accordance with PAP-201, Indoctrination and Training.
- 5.5.2 A Trainers' Training course is available through the Laboratory Training Coordinator for PNL staff assigned as trainers. The course is designed to enhance the consistent quality of training and is highly recommended for all assigned trainers.
- 5.5.3 Satisfactory completion of the Trainers' Training course shall be documented by Laboratory Training Coordination in the individual training records.

### 5.6 Scheduling of Training

- 5.6.1 In accordance with TCP-201, Coordinating and Scheduling of Training, the Laboratory Training Coordinator shall periodically issue a schedule of training courses which comprises the various courses offered by programs/departments at PNL. As specified in TCP-201, Coordinating and Scheduling of Training, these schedules of existing training courses, as well as new courses required,

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will be developed through the joint efforts of project/line managers and the Laboratory Training Coordinator. Project/line managers shall notify staff members to attend scheduled training.

### 5.7 Conducting Training

5.7.1 Prior to conducting training, assigned trainers shall review lesson plans for content and changes and obtain Training Attendance Forms (Exhibit 4) from Laboratory Training Coordination.

5.7.2 Upon completion of the training course, the assigned trainer shall return the lesson plan and the applicable Training Attendance Forms to Laboratory Training Coordination.

### 5.8 Documenting Training

5.8.1 Assigned trainers are responsible to ensure that attendance at training sessions is properly documented according to instructions on the Training Attendance Form.

5.8.2 Assigned trainers shall complete the Training Attendance Form and return it to Laboratory Training Coordination for use in updating individual training records.

5.8.3 Briefing documentation (Exhibit 3) shall be used by the project/line manager to document attendance at informal sessions if the project/line manager determines that the session is significant to license-related documentation.

5.8.4 After verifying that the required training has been completed, the cognizant project/line manager shall sign the Training Assignment Form and forward the original to the Laboratory Training Coordinator for incorporation in the individual training record.

### 5.9 Developing Lesson Plans

5.9.1 All formal classroom training shall be conducted in accordance with an approved lesson plan. Lesson plans shall be developed by assigned trainers designated by cognizant project/line managers (Ref. TCP-204). Lesson plans shall document the title of the course, specify the procedures, regulations or other standards that apply, indicate the purpose and objectives of the lesson plan, and outline the steps to be followed by the trainer to meet the required objective.

5.9.2 Upon completion of a lesson plan, the trainer shall submit it to the Laboratory Training Coordinator, the cognizant project/line manager, and the QA Department for review and approval, when appropriate.

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- 5.9.3 A master file of approved lesson plans shall be retained in Laboratory Training Coordination for future use and update.
- 5.9.4 The Laboratory Training Coordinator shall receive distribution of all revisions, changes, additions or deletions to procedures, manuals, OA plans, and other documents that affect training.
- 5.9.5 Laboratory Training Coordination shall identify lesson plans that are affected by changes, revisions, additions or deletions to procedures, manuals, codes, and standards and refer them to the cognizant project/line manager.
- 5.9.6 Changes to lesson plans shall be initiated by the assigned trainer and/or author, reviewed by Laboratory Training Coordination and approved by the cognizant project/line manager.

### 5.10 Training Waivers

- 5.10.1 Project/line managers may request exemption of some staff members from prescribed required departmental training on the basis of previous work history experience or previous training received. Waivers shall not be issued for required minimum training as specified in the PNL Master Training Matrix.
- 5.10.2 Requests for waivers (Exhibit 5) shall be initiated by the cognizant project/line manager, submitted with supporting documents for one-over-one approval by section or department manager, and when appropriate, submitted to QAD for concurrence.
- 5.10.3 Line managers shall ensure that training waivers do not compromise PNL's commitment to training.
- 5.10.4 Training waivers shall then be forwarded to the Laboratory Training Coordinator for review and entry into the individual training record.

### 5.11 Regualification Training

When determined by the cognizant manager, all staff members requiring certification shall receive regualification training at time intervals prescribed by applicable standards, codes, and regulations.

### 5.12 Retraining

- 5.12.1 Whenever changes (deletions, additions, revisions) to procedures, manuals, standards and codes have a significant impact on lesson plan objectives, an assessment of the need for retraining shall be made by the Laboratory Training Coordinator in consultation with the cognizant project/line manager.

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5.12.2 The Laboratory Training Coordinator shall prepare a report from the training file identifying individual staff members requiring retraining. The report will be forwarded to cognizant project/line managers for scheduling attendance at the next available course.

### 5.13 Documentation Management

5.13.1 Laboratory Training Coordination centrally retains all training records including attendance records, approved lesson plans, course evaluation, training appraisal, class tests and exercises, etc. These records are handled in accordance with PAP-1701, Research Project Records System, and TCP-202, Collection and Maintenance of Training Records.

5.13.2 Laboratory Training Coordination also maintains a computer-based training records system to assist project/line managers with identifying, planning and reporting training activities. After training specified for a position is completed and submitted to Laboratory Training Coordination, the information is entered into the data base system.

### 5.14 Instructional Management

5.14.1 To assist PNL in meeting requirements for project/department training, Laboratory Training Coordination uses the Training System Development (TSD) process, consisting of a system of planning, preparation, scheduling, documentation and evaluation. This is a training management system that enhances control of the training process and auditability of required training.

5.14.2 Initial training requirements will be identified in the job analysis process and listed in the training matrix. New training requirements will be identified through the evaluation/assessment process.

5.14.3 Project/line managers contact the Laboratory Training Coordinator to discuss new needs for specific training that is not available.

- If suitable training is not available, the training topic is evaluated by the Laboratory Training Coordinator and the project/line manager. If training is required, the requesting project/line manager assigns a trainer for development and presentation of the course.
- The assigned trainer shall develop the desired training course with assistance from the Laboratory Training Coordinator.

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### 5.15 Training Program Evaluation/Assessment

5.15.1 The training program and training courses are assessed and evaluated on an on-going basis by project/line managers and the Laboratory Training Coordinator, as part of the Training System Development process. There are six categories for evaluation and assessment:

- a) Content Evaluation - An examination of overall training planning by project/line managers, assigned trainers, and the Laboratory Training Coordinator.
- b) Input Evaluation - A review of use of equipment, materials, facilities, and program structures and content.
- c) Process Evaluation - An evaluation of training operations such as scheduling, training services, trainer performance, trainee response to courses, and support of project/departmental training.
- d) Quality - Assessment of the quality of training as evidenced by student feedback surveys and observer assessment.
- e) Documentation - Records maintenance of the results of each assessment.
- f) Improvement - Use of the assessments to improve trainer performance and upgrade training material to reflect change or revision.

Methods of evaluating/assessing training may include observing training courses, interviewing trainees, assessing performance of trained staff, etc., on a frequency as determined by the project/line manager or as recommended by the Laboratory Training Coordinator (Ref. TCP-203, Laboratory Training Coordination Assessment Program).

5.15.2 Results of evaluation/assessment in the six categories shall be summarized by the Laboratory Training Coordinator and reported to project/line management and OAD for review, concurrence, and necessary action.

### 6.0 REFERENCED DOCUMENTS

- 6.1 PAP-201, Indoctrination and Training
- 6.2 PAP-501, Preparation and Issue of Procedures
- 6.3 PAP-602, Document Change Control

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- 6.4 PNL-MA-60, Quality Assurance Manual for License-Related Programs
- 6.5 PNL-1701, Research Project Records System
- 6.6 TCP-201, Coordinating and Scheduling of Training
- 6.7 TCP-202, Collection and Maintenance of Training Records
- 6.8 TCP-203, Laboratory Training Coordination Assessment Program
- 6.9 TCP-204, Lesson Plan Preparation and Approval
- 6.10 Exhibit 1, Training Matrix
- 6.11 Exhibit 2, Training Assignment
- 6.12 Exhibit 4, Training Attendance
- 6.13 Exhibit 3, Briefing Documentation
- 6.14 Exhibit 5, Training Waiver

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# TRAINING MATRIX

REV. \_\_\_\_\_

PROJECT/DEPARTMENT																			
LEGEND A - required training R - recommended training		GEN-1	GEN-2	GEN-3	GEN-4	GEN-5	GEN-6	GEN-7	GEN-8	GEN-9	PAP-201-1	RC-1	RC-2	RPRC-1	SCP-1	SCP-2	TRAINERS	TRAINING	
JOB/POSITION	(job code)																		

RECOMMENDED BY  
PROJECT/LINE MANAGER (print name) \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

CONCURRED BY  
SECTION/DEPARTMENT MANAGER (print name) \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_



### TRAINING MATRIX INSTRUCTIONS

- 1) List all job/position titles applicable to the project or activity.
- 2) Identify the applicable job code for the position.
- 3) Indicate the training applicable to each job/position by placing the appropriate alpha identifier A (required) or B (recommended) under the appropriate course title.
- 4) Verify the selection of training for job/position by signing the Project/Line Manager signature line and indicating the date of completion.
- 5) Obtain one-over-one concurrence of the section or department manager.
- 6) Forward a copy of the completed training matrix to Laboratory Training Coordination.

TRAINING ASSIGNMENT

To \_\_\_\_\_ Date \_\_\_\_\_

From \_\_\_\_\_

PART A

You are scheduled to complete the training indicated in Parts B and C to assure that you are sufficiently knowledgeable in the (name of project or activity) technical and QA requirements and procedures. Upon completion of this assignment, present this document to the undersigned.

(Project/Line Manager)

Signature \_\_\_\_\_ Date \_\_\_\_\_

PART B

The items checked ( ) indicate the formal training in which you are required to participate. Please plan to attend the scheduled training sessions.

		Scheduled Training Completion		Sign and Date When Completed
		Prior to Job Performance	During Job Performance	
( )	1. Classroom Training			
	a) _____	_____	_____	_____
	b) _____	_____	_____	_____
	c) _____	_____	_____	_____
( )	2. Other Training Required			
	a) _____	_____	_____	_____
	b) _____	_____	_____	_____
	c) _____	_____	_____	_____

TRAINING ASSIGNMENT

PART C

Required Reading

You are assigned to read and understand the following Administrative Procedures and Technical Procedures.

	Scheduled Training Completion		Sign and Date
	Prior to Job Performance	During Job Performance	When Completed
( ) 1. Administrative Procedures			
Note: Place in a vertical column the procedure by number.			
a) _____	_____	_____	_____
b) _____	_____	_____	_____
c) _____	_____	_____	_____
d) _____	_____	_____	_____
e) _____	_____	_____	_____
f) _____	_____	_____	_____

Note: If more Administrative Procedures need to be listed than space allows, use an attached sheet with the same format and add a note that an attachment has been added.

( ) 2. Technical Procedures			
a) _____	_____	_____	_____
b) _____	_____	_____	_____
c) _____	_____	_____	_____
d) _____	_____	_____	_____
e) _____	_____	_____	_____
f) _____	_____	_____	_____

Note: If more Technical Procedures need to be listed than space allows, use an attached sheet with the same format and add a note that an attachment has been added.

BRIEFING DOCUMENTATION

PROJECT/DEPARTMENT \_\_\_\_\_ DATE \_\_\_\_\_

Briefing documentation is optional at the discretion of the project/line manager. The objective of the form is to document attendance at briefing sessions that are significant to quality of license-related activities.

DESCRIPTION OF BRIEFING

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SIGNATURE	PRINTED NAME	PAYROLL NUMBER	PROGRAM/DEPARTMENT

CONDUCTED BY \_\_\_\_\_

SUBMITTED BY  
PROJECT/LINE MANAGER \_\_\_\_\_ (Signature) \_\_\_\_\_ (Date)

# BRIEFING DOCUMENTATION INSTRUCTIONS

- 1) Applied to significant training without an approved lesson plan.
- 2) Identify the project/department title and date.
- 3) Write a description of the training subject.
- 4) Obtain the signature, printed name, and payroll number of the trainee.
- 5) Identify the trainee's program/department.
- 6) Identify the person conducting the briefing session.
- 7) Route to project/line manager for signature and transmit to Laboratory Training Coordination.

TRAINING ATTENDANCE

DATE \_\_\_\_\_

LESSON PLAN (Title, No., Rev.) \_\_\_\_\_

TRAINER(S) \_\_\_\_\_

OVERALL COURSE TIME \_\_\_\_\_

USE BLACK INK

STAFF MEMBER NAME BELOW		PAYROLL NUMBER	PROJECT/ DEPARTMENT
SIGNATURE	PLEASE PRINT NAME		

CONDUCTED BY \_\_\_\_\_ (print name)

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(date)

# TRAINING ATTENDANCE INSTRUCTIONS

- 1) Identify date and time of training.
- 2) List the lesson plan title and number and identify the revision of the lesson.
- 3) Print the trainer's name and any training presenter(s).
- 4) Indicate total course time.
- 5) Obtain signature and printed name and payroll number of all trainees.
- 6) List project and/or department.
- 7) Sign and date.
- 8) Return to Laboratory Training Coordination.

TRAINING WAIVER

PRINT NAME \_\_\_\_\_  
(Last) (First)

PAYROLL NUMBER \_\_\_\_\_

COURSE NUMBER \_\_\_\_\_

COURSE TITLE \_\_\_\_\_

JUSTIFICATION FOR WAIVER (Attach documents of verification to this form)

Submitted by  
PROJECT/LINE MANAGER

\_\_\_\_\_  
(Last) (First) (Signature) (Date)

Approved by  
SECTION/DEPARTMENT MANAGER

\_\_\_\_\_  
(Last) (First) (Signature) (Completion)  
(Date)

Concurred by  
QUALITY ASSURANCE DEPARTMENT

Reviewed and Filed  
LABORATORY TRAINING COORDINATOR

\_\_\_\_\_  
(Last) (First) (Signature) (Completion)  
(Date)

STAFF MEMBER SIGNATURE \_\_\_\_\_ (date) \_\_\_\_\_

# TRAINING WAIVER INSTRUCTIONS

- 1) List printed name and date.
- 2) List payroll number.
- 3) List course number, if applicable.
- 4) List course title.
- 5) State the justification for waiver and attach any supporting documents.
- 6) All approval signatures are required before the training waiver is valid.
- 7) QAD forwards approved waiver to Laboratory Training Coordinator.
- 8) Laboratory Training Coordinator notifies cognizant project/line manager of approved waiver.
- 9) Staff member notified of waiver and signs "acknowledged".