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		Revision Number: 2 Revision Date: July 18, 2011
Contact: ISO Director, Operations		Approved by: M/LCC Heads
		Review Due Date: July 18, 2013

Master/ Local Control Center Procedure No. 17


(M/LCC 17)

ISO and Local Control Center Training

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1. References


NERC Reliability Standard EOP-005- System Restoration from Blackstart Resources
 NERC Reliability Standard PER-005 - System Personnel Training
 SOP-RTMKTS.0200.0005 - Create OPTI Training Schedules
 SOP-RTMKTS.0200.0025 - Maintain OPTI Training Records
 SOP-RTMKTS.0200.0070 - Evaluate Training Program Effectiveness

2. Background

Joint ISO New England (ISO)/Local Control Center (LCC) training efforts have historically been undertaken to provide the following:

- A coordinated continuing training program for ISO and LCC System Operators that addresses US Federal Energy Regulatory Commission (FERC), North American Electric Reliability Corporation (NERC), Northeast Power Coordinating Council, Inc. (NPCC), ISO, and LCC policies, procedures, guidelines, standards, and instructions;
- Instruction and information dissemination over the course of the year that provides consistent expectations and reinforces an operational philosophy set forth by the Master/Local Control Center (M/LCC) Heads;
- An environment that provides ISO and LCC System Operators an opportunity to interact and discuss common operational issues, thereby promoting more efficient system operation and improved teamwork between ISO and LCC System Operators.

The intent of this procedure is to establish protocols for all formal training efforts undertaken together by ISO and the LCC Operations Training organizations. It addresses processes and requirements necessary to the application of a systematic approach to operator training, the adoption of which is required by NERC Reliability Standard PER-005 - System Personnel Training. As part of an effort to keep the responses to the provisions of that standard consistent across the separate organizations, the standard definition for “Reliability-Related Task,” which appears in Section 3.0, Definitions has been adopted by ISO and the LCC organizations.

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3. Definitions

Coordinated Training - The portion of the operator continuing training program that is developed independently by the ISO and LCC organizations but is implemented together. This type of training addresses the instructional objectives and tasks common to members of a training audience from a single organization and addresses them as they relate to another organization's operations. It is usually conducted as an exercise with events or system conditions that require an interactive response from one or more LCC organizations.

Instructional Package - Collection of instructional materials consisting of Classroom Lesson Plan; written test items and tests; and all accompanying materials (e.g., PowerPoint and Turning Point "Presentations", handouts, trainee worksheets, as appropriate).

Inter-Control Center Training - The comprehensive description for any type of operator continuing training conducted simultaneously with ISO and one or more LCC organizations.

Joint Trainers Task Force (JTTF) - A task force comprised of trainers from each of the New England LCC and ISO organizations.


Joint Training - The portion of the operator continuing training program that is developed and implemented jointly by the ISO and LCC organizations. This type of training addresses the instructional objectives common to members of a training audience consisting of both ISO System Operators and one or more LCC System Operators.

Long Range Training Plan - Rolling training schedule of broad topic areas to be addressed in the ISO and ISO/LCC Joint Training Cycles.

Reliability-Related Task - A task that impacts the ability of the electric system to supply the aggregate electrical demand and energy requirements of the customers at all times, taking into account scheduled and reasonably expected unscheduled outages of system elements. Under more severe conditions, a task that contributes to maintaining the integrity of the Bulk Electric System (BES) or a task that impacts the BES ability to withstand disturbances without suffering frequency or voltage related instability, unplanned tripping of load or generation or uncontrolled separation or cascading outages affecting a widespread area of the Interconnection.


Subject Matter Expert - A person that meets the organization's performance requirements for the tasks being trained.

Training Pilot - Course implementation that occurs prior to the official delivery of the course intended to ensure time allocations and the efficiency and effectiveness of instructional techniques.

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4. Applicability

This procedure is applicable to Inter-Control Center training programs only. ISO and each LCC may have internal procedures that are already established for the development and delivery of programs, which would be superseded by this procedure for only those programs implemented jointly.

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5. Responsibilities

5.1 M/LCC Heads

1. The M/LCC Heads are responsible for:
 - A. Providing direct input to their respective JTTF members for potential Inter-Control Center training topics.
 - B. Reviewing and approving the Inter-Control Center training topics contained in the Annual Training Schedule each year.
 - C. Ensuring all ISO and LCC System Operators participate in the yearly coordinated ISO-LCC Restoration training exercise each year, usually in Cycle 3.
 - D. Ensuring personnel engaged in the design, development or implementation of training meet the qualifications established by the ISO Systematic Approach to Training Manager, (SAT Manager).

5.2 Joint Trainers Task Force

1. The JTTF (as defined in the JTTF Charter) is responsible for:
 - A. Reviewing and initially approving the Proposed Inter-Control Center Training Cycle Schedule and training topics annually.
 - B. No later than two months prior to each respective cycle, determining:
 - 1) Training settings,
 - 2) Personnel assigned as:
 - a. Primary and alternate instructors (the primary instructor being responsible for development and implementation), and
 - b. Technical reviewers for each Inter-Control Center training cycle.
 - C. Determining training requirements for Inter-Control Center training based on:
 - 1) Common objectives determined by the M/LCC JTTF and derived from Job and Task Analysis (JTA) data and changes to JTA data, when such data becomes available, as set forth in the M/LCC JTTF Charter (Attachment A) for Joint Training or.

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- 2) Interrelated functions between two or more organizations that require formal communications and extensive interactions for Coordinated Training.
 - 3) FERC, NERC and NPCC training requirements.
- D. Developing/delegating development of Joint Training and submitting all required development documents to the ISO Manager, Operational Performance, Training and Integration Department (OPTI), in a timely manner.
 - E. Making the required changes to the developed materials identified during the review for ISO/LCC Joint Training sessions, in a timely manner.
 - F. Contacting the NERC Continuing Education Administrator of the entity that awarded NERC CE Hour credit as soon as possible when a discrepancy is found with the upload of CE Hour information to any operator transcript in the NERC SOCCED.
 - G. Piloting the training.
 - H. Delivering and documenting all Inter-Control Center training in accordance with this procedure.
 - I. Providing feedback on improvements needed for future training.

NOTE

The ISO Manager, OPTI may temporarily delegate responsibilities outlined in this procedure as necessary to meet time sensitive tasks.

5.3 ISO Manager, OPTI

1. The ISO Manager, OPTI is responsible for:
 - A. Chairing all meeting sessions of the JTTF.
 - B. Ensuring the System Operator training undertaken as Inter-Control Center Training is conducted per the guidelines established by the M/LCC Heads and the JTTF.
 - C. Ensuring the System Operator training undertaken as Joint Training by ISO and LCC organizations is developed per a Systematic Approach to Training (SAT) process.

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- D. Reviewing and approving all materials developed for ISO/LCC Joint Training sessions.
- E. Ensuring the coordination and implementation of Inter-Control Center training occurs as scheduled.
- F. Approving the JTTF selection of instructors.
- G. Designating the Records Administrator responsible for record-keeping processes for all ISO/LCC Joint Training in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Training Records.
- H. Ensuring timely compliance with the standards and processes for ISO/LCC Joint Training as set forth in this procedure.

NOTE

The ISO SAT Manager may temporarily delegate responsibilities outlined in this procedure as necessary to meet time sensitive tasks.

5.4 ISO SAT Manager


1. The ISO SAT Manager is responsible for:
 - A. Reviewing and approving the instructional and systematic soundness of all materials developed for ISO/LCC Joint Training programs.
 - B. Evaluating the effectiveness of instructor performance for all ISO/LCC Joint Training programs.
 - C. Developing and implementing the centralized instructor development and qualification program.

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6. Procedure


6.1 Scheduling and Assigning of Responsibilities

1. The JTTF shall determine which training cycles will be scheduled with Inter-Control Center training.
 - A. System Restoration training must be scheduled annually.
2. Each M/LCC Head shall provide requests for Joint Training.
3. Each M/LCC Head shall review and approve the Inter-Control Center portions of the Annual Training Schedule prior to October 1st previous to the effective year.
4. The JTTF shall determine training requirements for Joint Training based on commonalities in Job and Task Analysis (JTA) data and data changes, when such data becomes available, as well as on FERC, NERC, and NPCC requirements.
5. The JTTF shall review all training applicable to ISO and/or multiple LCCs containing new content or protocols as well as all proposed Joint Training for consistency and conformity to ISO operating procedures and M/LCC procedures.
6. The JTTF shall determine the immediacy of the need to address Joint Training requirements and designate each training requirement as either:
 - A. Short notice: If the need is deemed immediate, the JTTF shall determine the training setting and schedule and assign the personnel responsible for development and delivery, as well as assigning the alternate instructor that will perform the required training related tasks due to the absence of the primary responsible instructor.
 - B. Addressable in Cycle Training: If any needed training must be addressed in Cycle Training, the Trainers JTTF shall:
 - 1) Add the needed training to the Annual Training Schedule;
 - 2) Specify the Cycle in which the needed training requirement will be addressed;
 - 3) Determine the training setting;
 - 4) No later than two months prior to the selected Cycle, assign a primary instructor and, when possible, an alternate instructor.

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7. By September 1st prior to the effective year, the Chair of the JTTF shall develop the Annual Training Schedule.
 - 1) This training schedule shall be published to the M/LCC Heads, the JTTF and the OPTI shared document site.
 - 2) The updated schedule shall be incorporated into the Long Range Training Plan.

8. The ISO Manager, OPTI shall provide the JTTF with the following information at least one month prior to Cycle 2 and 4 to allow each LCC organization to develop appropriate seasonal training:
 - A. Seasonal Outlook information
 - 1) The 50/50 and 90/10 assessment
 - 2) Projected peak load and capacity analysis
 - 3) Seasonal Capacity Action Plan
 - 4) Expected major transmission and generation outages

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6.2 Joint Training


1. Development

A. Instructional Objectives


- 1) The Responsible instructor shall translate assigned training requirements into instructional objectives.
- 2) Six weeks (but no fewer than three weeks) prior to Training Pilot, the Responsible Instructor shall submit instructional objectives electronically to the ISO OPTI shared mailbox using Attachment C - Instructional Objective Review and Approval,
(Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)
- 3) The ISO SAT Manager shall:
 - a. Review/approve the instructional objectives for instructional effectiveness using Attachment C - Instructional Objective Review and Approval
 - b. Verify an electronic version of Attachment C - Instructional Objective Review and Approval is retained in the Share Point data base
- 4) The ISO Manager, OPTI shall:
 - a. Review/approve the instructional objectives using Attachment C - Instructional Objective Review and Approval
 - b. Verify an electronic version of Attachment C - Instructional Objective Review and Approval is retained in the Share Point data base
 - c. Notify the Responsible Instructor of the instructional objective review status within five working days of receiving Attachment C- Instructional Objective Review and Approval

B. Evaluation Instruments

- 1) The Responsible instructor shall develop the following evaluation instruments:
 - a. Written Items
 - i. Enough test items shall be developed to ensure each objective can be addressed with a test item in the primary testing instrument and that an alternate testing instrument can be created with 100% of the test items changed.

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- ii. Test item types shall include one or more of the following: multiple choice, completion, drawing/labeling, matching, fill in the blank, short answer. True/false items shall NOT be used.
- 2) The following evaluation instruments shall be submitted.
- a. Written Evaluations
 - i. The Responsible Instructor shall:
 - a) Submit test items with answers clearly indicated and a copy of Attachment I - Written Test Item Approval form to the designated SME for technical review.
 - b) Six weeks but no fewer than three weeks prior to Training Pilot and when signed by the technical reviewer, submit an electronic copy of Attachment I - Written Test Item Approval form and electronic copies of test items with answers clearly indicated to the ISO OPTI shared mailbox.
(Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)
 - ii. The ISO Manager shall:
 - a) Using Attachment I - Written Test Item Approval form, review/approve written test items for instructional effectiveness
 - b) Verify the completed Attachment I - Written Test Item Approval form is retained electronically in the Share Point data base
 - iii. The ISO Manager, OPTI shall:
 - a) Using Attachment I - Written Test Item Approval form, review/approve written test items
 - b) Verify the completed Attachment I - Written Test Item Approval form is retained electronically in the Share Point data base
 - iv. Within five working days of receiving Attachment I - Written Test Item Approval form, the ISO Manager, OPTI shall notify the Responsible Instructor of the written test item review status.
 - b. Evaluated Exercises
 - i. The Responsible Instructor shall:
 - a) Submit an Attachment J - Exercise Evaluation Approval form to the designated SME for technical review.

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- b) Six weeks but no fewer than three weeks prior to Training Pilot, submit a copy of Attachment D - Exercise Evaluation Approval form that has been signed by the technical reviewer to the ISO OPTI shared mailbox.
(Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)

ii. The ISO SAT Manager shall:

- a) Using Attachment J- Exercise Evaluation Approval form, review/approve the exercise evaluation for instructional effectiveness
- b) Verify the completed Attachment J - Exercise Evaluation Approval form is retained electronically in the Share Point data base


iii. The ISO Manager, OPTI shall:

- a) Using Attachment J - Exercise Evaluation Approval form, review/approve the exercise evaluation
- b) Verify the completed Attachment J - Exercise Evaluation Approval form is retained electronically in the Share Point data base


iv. Within five working days of receiving Attachment J - Exercise Evaluation Approval form, the ISO Manager, OPTI shall notify the Responsible Instructor of the Exercise Evaluation review status.

C. Instructional Materials

- 1) The Responsible Instructor shall develop a Classroom Lesson Plan in a format similar to that in Attachment D - Classroom Lesson Plan that contains the following minimum information:
 - a. Lesson Title
 - b. Revision
 - c. Placeholder for Course ID
 - d. Instructional Objectives listing
 - e. References
 - f. Instructional Equipment
 - g. Lesson Duration

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- h. Lesson content material in outline format with sufficient detail to fully address instructional objectives
 - i. Instructional objective references as they correspond to content
 - j. Instructional materials as they correspond to content
 - k. Testing method
- 2) As appropriate, the Responsible Instructor shall develop the following accompanying training materials:
- a. PowerPoint or Turning Point “Presentations”
 - b. Handouts
 - c. Trainee Worksheets
- 3) The Responsible Instructor shall submit all lesson materials to a designated technical reviewer, who can be, but is not limited to, one of the following job/task classifications:
- a. SME
 - b. Engineer in charge of project
 - c. System Operator
 - d. Supervisor
 - e. Another Training Instructor
 - f. Developer of software
- 4) No fewer than two weeks prior to the Training Pilot and when technical approval has been obtained using Attachment E - Instructional Package Review and Approval, the Responsible Instructor shall submit a copy of Attachment E - Instructional Package Review and Approval and electronic copies of Attachment D - Classroom Lesson Plan and all lesson materials to the ISO OPTI shared mailbox.
(Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)
- a. The ISO SAT Manager shall.
 - i. Using Attachment E - Instructional Package Review and Approval review/approve the instructional package for instructional effectiveness
 - ii. Verify a completed Attachment E - Instructional Package Review

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and Approval form is retained electronically in the Share Point data base


b. ISO Manager, OPTI shall

- i. Review/approve the exercise evaluation using Attachment E - Instructional Package Review and Approval
- ii. Verify a completed Attachment E - Instructional Package Review and Approval form is retained electronically in the Share Point data base
- iii. Within five working days of receiving Attachment E - Instructional Package Review and Approval, notify the Responsible Instructor of the Exercise Evaluation review status.


D. Individual Learning Activity (ILA)

- 1) The Responsible Instructor for the development of the course materials shall complete a NERC Continuing Education (CE) ILA application (located under "Applications and Forms" at <http://www.nerc.com/page.php?cid=6|82|208>)
- 2) No later than two weeks prior to Training Pilot, the Responsible Instructor shall submit the completed NERC CE ILA application to the ISO Manager, OPTI
- 3) No later than one week after the implementation of the training segment, the ISO Training Administrator (NERC Continuing Education Administrator) shall review and enter each completed ILA Application into the SOCCED.

2. Conduct of Training Pilot
A. The Manager, OPTI shall ensure a pilot is conducted for all jointly developed and implemented training to ensure:
1) The effectiveness of time allotments
2) The accuracy and completeness of instructional content
3) Informal feedback is provided on instructional effectiveness to Responsible Instructors.
B. All Responsible Instructors (i.e., either the primary or alternate) attend the Pilot training session.

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<p>C. All agreed upon changes to materials and delivery methods are completed by each respective instructor prior to implementation of training.</p>
<p>D. The materials and delivery methods used for the Training Pilot, with any changes required as a result of the pilot, are not be deviated from during the first implementation of the training.</p>
<p>3. Implementation of Training</p>
<p>A. Attendance</p>
<p>1) Any participant that fails to attend a training session and/or is more than 15 minutes tardy for a training session shall not be awarded CE Hours for that training session.</p>
<p>2) Any participant that fails to sign a training session Roster (containing the information required in Attachment F - Sample Roster) shall not be awarded CE Hours for that training session.</p>
<p>3) By close-of business on the Monday following the training week, each Responsible Instructor shall submit the applicable training session Roster to the designated ISO OPTI Training Administrator.</p>
<p>4) When an unregistered trainee desires to attend the cycle training for any reason, the LCC or ISO Training Coordinator shall contact the ISO OPTI Training Administrator before close of business on Monday of the week of training to ensure that the trainee</p>
<p>a. Is included in all ISO TEN-administered applications</p>
<p>b. Receives appropriate credit for attending the course.</p>
<p>B. Testing Protocol</p>
<p>1) Participants shall complete any required written testing utilizing ISO-TEN no later than one week after training segment completion. (Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)</p>


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NOTE

An honor statement is included in the instructions of all ISO-TEN administered tests to remind the trainee that all work on the test will be their own and that by starting the exam they are stating that they have neither given nor received aid to complete the exam.

This serves as the Learning Contract described in the NERC Continuing Education Administrative Manual.

- 2) No later than one week after exercise completion, the Responsible Instructor shall submit each completed exercise evaluation form to the ISO OPTI Training Administrator.
(Exceptions to this requirement shall be approved by both the respective LCC Head and the JTTF Chair.)
- 3) No later than one month from the conclusion of the training segment, the ISO OPTI Training Administrator shall upload all exercise evaluation forms to the program files maintained on the ISO SharePoint.
- 4) No later than one month from the conclusion of the training segment, the ISO OPTI Training Administrator shall enter all written testing data to the training records database.
 - a. An ISO-NE Operations Training Attendance Report sheet (Attachment F - Sample Roster) shall be signed by all training attendees at the start of each Joint Training presentation.
 - b. An OPTI representative will collect the sheet at the conclusion of each presentation and sign and date the sheet.
- 5) For Joint Training Webex presentations, each LCC shall be responsible for ensuring trainee sign off of the ISO-NE Operations Training Attendance Report sheet and for submitting the completed sheets to the ISO OPTI shared mailbox.
- 6) The ISO OPTI Training Administrator shall:
 - a. Record the attendance records of NERC Certified trainees who attended all parts of the training
 - b. After verifying the xml data for accuracy, file the test score or exercise evaluation records appropriately for processing into xml format,
 - c. Upload the appropriate forms to the SOCCED to award the CE Hour(s) to successful attendees
- 7) No later than two week after the last day of the training cycle and using ISO-TEN the ISO OPTI Training Administrator shall conduct the Written Test Item Analysis

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- 8) No later than one week from the receipt of test scores data, the ISO OPTI Training Administrator shall upload all Written Test Item Analysis Data records to the program files maintained on the ISO SharePoint.
- 9) When uploading of all the Written Test Item Analysis Data records has been completed, the ISO OPTI Training Administrator shall notify the LCC Training Coordinators.
- 10) The ISO SAT Manager shall:
 - a. Re-evaluate all written test items receiving either higher than 90% or lower than 40% correct responses for instructional validity/reliability problems
 - b. Submit feedback to the Responsible Instructor
- 11) The Responsible Instructor shall re-obtain content accuracy feedback from either an independent SME or another instructor for all written test items receiving lower than 40% correct responses.
- 12) By the next implementation of the training topic, the Responsible Instructor shall either revise or replace any written test item receiving lower than 40% correct responses.

NOTE
The minimum passing score for written testing is 75%.


- 13) The Manager, OPTI shall verify the Remediation policy used for participants who score less than 75% on a written test meets the requirements of the NERC Continuing Education Program Administrative Manual.

C. Trainee Course Evaluations

- 1) The ISO OPTI Training Administrator shall create ISO Trainee Course Evaluation forms to be distributed by the Responsible Instructor for each ILA.
- 2) At the conclusion of each session each participant shall receive and complete a Trainee Course Evaluations (Attachment G - Trainee Evaluation Form).
- 3) At the conclusion of each training segment each participant shall submit Trainee Course Evaluations (Attachment G - Trainee Evaluation Form) to the ISO OPTI shared mailbox.

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- 4) When the completed Trainee Course Evaluations (Attachment G - Trainee Evaluation Form) are received, the ISO OPTI Training Administrator shall :
 - a. Generate Trainee Evaluation Summary Reports (Attachment H - Trainee Evaluation Summary) - one summary per ILA, along with a summary of all ILAs within a cycle training.
 - b. No later than one week from the conclusion of the training segment, upload Trainee Evaluation Summary Reports to the program files maintained on the ISO SharePoint
4. Training Program Effectiveness Evaluation
- A. The effectiveness of the continuing education effort, as addressed through ISO/LCC Joint Training shall be evaluated by the ISO Manager, OPTI as directed in SOP-RTMKTS.0200.0070 - Evaluate Training Program Effectiveness

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6.3 Coordinated Training

<p>NOTE</p> <p>Training topics which present a situation or condition that requires coordination between ISO and one or more LCC organizations may be conducted as Coordinated Training.</p> <p>This type of training is usually performed by table-top simulation and discussion, a coordinated exercise on multiple simulators, or an exercise using a common simulation environment, e.g., the BRICK restoration simulator.</p>

1. For Coordinated Training:
 - A. Each participating organization shall independently develop the following based on their own internal procedures,:
 - 1) Instructional objectives
 - 2) Evaluation instruments
 - 3) Other associated instructional materials
 - B. Each organization shall be responsible for development and submission of its own ILA via their NERC Continuing Education Administrator.
 - C. A coordinated pilot may be conducted to:
 - 1) Walk-through the sequence of events
 - 2) Verify communication paths for both participants and instructors
 - 3) Provide informal feedback on instructional effectiveness
 - D. Implementation and effectiveness evaluation of Coordinated Training shall be conducted by each organization based on their own internal procedures.

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7. Revision History

Rev. No.	Date	Reason
0	12/03/09	Initial draft
1	02/01/10	Added SOP titles to Section 1 References, Section 5.4 step F, and to Section 6.5
2	07/18/11	Biennial review by procedure owner; Globally changed all document fonts to Arial; Globally changed OPTD to OPTI to reflect group & Manager, OPTI re-title and added SAT Manager; Section 1 added EOP-005, RTMKTS.0200.005; Section 2 defined acronym LCC, in 1 st bullet replaced refresher with continuing, in 2 nd paragraph replaced jointly with together & added new last sentence, and reorganized definitions into alphabetical order & added definitions for reliability subject matter expert and related task; Section 4 replaced "Joint ISO/LCC" with "Inter-Control Center" Sections 5 & 6 major re-write to reflect organizational changes and changes in current practices and management expectations, clarified text related to M/LCC Heads & JTTF responsibilities for requesting & reviewing training, replaced "anchored essay" with fill in the blank for allowable test question types, and clarified M/LCC Heads & JTTF responsibilities for requesting & reviewing training; Retired Attachment B; Added new Attachment I and new Attachment J

8. Attachments

Attachment A - Joint Trainers' Task Force Charter

Attachment B - Retired (07/18/11)

Attachment C - Instructional Objective Review and Approval

Attachment D - Classroom Lesson Plan

Attachment E - Instructional Package Review and Approval

Attachment F - Sample Roster

Attachment G - Trainee Evaluation Form

Attachment H - Trainee Evaluation Summary

Attachment I - Written Test Item Approval

Attachment J - Exercise Evaluation Approval