


System Operating Procedures

SOP-RTMKTS.0200.0005

Create OPTI Training Schedules

Effective Date: July 18, 2011
Revision No. 1

	© ISO New England Inc. 2011	Procedure: Create OPTI Training Schedules
	Process Name: Perform Operations Training	
	Procedure Number: RTMKTS.0200.0005	Revision Number: 1
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SOP-RTMKTS.0200.0005


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1. Objective

NOTE


Before implementing any modification to current Operational Performance, Training and Integration group (OPTI) policies, procedures or practices recommended by auditors or outside authorities, equivalent existing procedures or practices must be compared to the recommended change and evaluated for value added, applicability to ISO and cost effectiveness by the Manager, OPTI and the affected OPTI staff.

The objective of this procedure is to document the process used to create the short term (annual), long term (triennial rolling) and weekly training schedules. This procedure applies to the following OPTI programs: Training Operations Professionals Program (TOPP), Continuing System Operator Training Program and OPTI Instructor Training Program. The Program Descriptions for each of the programs are located on the Enterprise Document Library (EDL) in Real Time Markets, Related Documents.

2. Background

The ISO OPTI group is responsible for the delivery of scheduled training to Operations Department personnel that addresses company-specific bulk electric system (BES) reliability-related tasks and other identified training objectives. The scheduled training is delivered primarily during four Training Cycles annually and must include specific content to satisfy North American Electric Reliability Corporation (NERC) Reliability Standards and Continuing Education Program Requirements, Northeast Power Coordinating Council Inc., ISO Corporate Objectives, Master/Local Control Center Procedure No. 17 - ISO and Local Control Center Joint Training (M/LCC 17) Trainers Charter requirements, as well as other management-identified training requirements. The training dates and topics must be published and available to the M/LCC Heads and Trainers to coordinate ISO/LCC training activities during training cycles.

OPTI is also responsible for the delivery of Training Operations Professionals Program (TOPP). TOPP is delivered on an as-needed basis as required by the business. Training dates and topics are published to coordinate training resources.


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3. Responsibilities

1. The Manager of OPTI is responsible for:
 - A. Ensuring that a current, valid Long Range Training Plan, an Annual Training Schedule, and Weekly Training Schedule is published to the OPTI SharePoint site in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records and is available upon request.
 - B. Ensuring the Annual Training Schedule addresses all approved Training Requests and Training Change Requests, in accordance with SOP-RTMKTS.0200.0015 - Request OPTI Training and Changes to Training, Master/Local Control Center Procedure No. 16 - Seasonal Preparations (M/LCC 16) and all mandatory training identified in Attachment C - Training Required by NERC Reliability Standards.
 - C. Updating the Annual Training Schedule as needed to include new training requests and Instructor Training.
 - D. Appointing an OPTI Training Coordinator (TC) as Scheduling Coordinator (SC)
2. The OPTI Training Administrator (TA) is responsible for compiling and publishing the Weekly Training Schedule
3. When needed, the OPTI TC is responsible for compiling and publishing the applicable schedule.

4. Controls


1. The Annual Training Schedule will be published by the identified deadline.
2. The Long Range Training Plan will be published by the identified deadline.
3. The Weekly Training Schedule will be published by the identified deadline.

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5. Instructions


5.1 Create the Long Range Training Plan

1. Annually, the Manager, OPTI shall revise the existing Long Range Training Plan by performing the following actions:
 - A. To maintain a three year training projection, delete the current calendar year content and add the next sequential calendar year content, including the following:
 - (1) Projected training dates for all four training cycles
 - (2) Expected topics for each training cycle.
 - (3) Estimated Continuing Education (CE) Hour value in each training cycle.
 - (4) Other identified training commitments from Attachment C or other sources i.e., corporate projects, software, etc.
2. The Manager, OPTI shall post the Long Range Training Plan as the Master Copy maintained by the department to the OPTI Sharepoint site.
3. No later than October 1, the Manager, OPTI shall transmit the Long Range Training Plan to the following:
 - Director, Operations
 - Director, Operations Support Services
 - Director, Project Management Office
 - M/LCC Heads
 - M/LCC Trainers

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5.2 Create the Annual Training Schedule


1. The Manager, OPTI shall use the Long Range Training Plan as the basis for creating an Annual Training Schedule that will:
 - A. Identify the dates and topics for both mandatory and non-mandatory training
 - B. Satisfy the identified NERC Continuing Education and Reliability Standards compliance requirements identified in Attachment C and Attachment D - NERC Certification Maintenance Requirements.
 - C. Use the following periods as guidelines for Cycle training in the Annual Training Schedule 52 week calendar:
 - a. Cycle 1/Weeks 4 through 9
 - b. Cycle 2/Weeks 17 through 22
 - c. Cycle 3/Weeks 37 through 42
 - d. Cycle 4/Weeks 46 through 51
 - D. Use the following periods as placeholders for NPCC System Operators Spring and Fall Seminar:
 - a. Wednesday and Thursday of the first full week in May.
 - b. Wednesday and Thursday of the first full week in November.
 - E. Include approved Training Requests and Training Change Requests that are scheduled in accordance with SOP-RTMKTS.0200.0015 - Requesting OPTI Training and Changes to Training.
 - F. When provided to the Manager, OPTI by the Chair of the System Restoration Working Group (SRWG), include the time period for the NPCC Inter-Area Restoration Exercise.
2. Annually, no later than August 1, the Director, Operations, Manager, Control Room Operations and Manager, OPTI, as a minimum, shall meet to validate the following year Annual Training Schedule.

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NOTE

When posted to the OPTI SharePoint, it is an expectation that the finalized Annual Training Schedule (i.e., the OPTI Master Copy) be maintained by the OPTI staff members as directed in SOP-RTMKTS.0200.0025 - Maintain OPTI Records.

3. The Manager, OPTI shall post the finalized Annual Training Schedule as the OPTI Master Copy to the OPTI Sharepoint Site.
4. No later than September 1, the Manager, OPTI shall transmit the finalized Annual Training Schedule to the following:
 - Vice President, Operations
 - Director, Operations
 - Director, Operations Support Services
 - Director, Project Management Office
 - Managers, Hourly and Monthly Market Operations
 - M/LCC Heads
 - M/LCC Trainers

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5.3 Revise the Annual Training Schedule

NOTE

All training presented or sponsored by OPTI should be included in the Annual Training Schedule.


When re-posted, in accordance with Steps 5.2.3 and 5.2.4, a revised Annual Training Schedule becomes the current OPTI Master Copy.

1. The Manager, OPTI shall incorporate an accurate indication of the training date(s) and topic description(s) of all instances of training not identified in the current Annual Training Schedule as a new revision to the Annual Training Schedule.

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5.4 Create the Weekly Training Schedule

2. By the Close of Business (COB) on Wednesday the week preceding a cycle of training, the OPTI Training Administrator shall compile and publish the Weekly Training Schedules for the applicable cycle that includes the following information:
 - A. Topic(s) for the day with instructor and estimated time of session, including but not limited to presentations, simulator scenarios, Computer Based Training (CBT) Modules, Software training and exams.
 - B. CE Hour value, identifying pre-work (if applicable)
 - C. Coordinated Training or ISO-only
 - D. Location of training
3. The OPTI Training Administrator shall send an email containing the Weekly Training Schedule to the following:
 - Director, Operations
 - Manager, OPTI
 - Manager, Control Room Operations
 - Control Room Personnel
 - For Coordinated Training only include M/LCC Trainers, (using the “M S Trainers” group address)
4. The OPTI Training Administrator shall update the DTS/TTSE calendar located on the OPTI Sharepoint site.

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5.5 Create the Training Operations Professionals Program (TOPP) Schedule


- 5.5.1 General**
1. The Manager, Control Room Operations shall provide notice at least four weeks prior to the employment starting date of a TOPP candidate to the Manager, OPTI.
 2. The OPTI SC shall update the DTS/TTSE calendar on the OPTI Sharepoint site.

- 5.5.2 Standard TOPP**
1. When the starting date for a Phase 1 class is known, the Manager, OPTI, shall direct a Training Coordinator to develop the TOPP Phase 1 Schedule.
 2. When a TOPP candidate is selected for Phase 2, the Manager, Control Room Operations shall provide notice at least four weeks prior to the expected starting date of Phase 2 training.
 3. When the starting date for Phase 2 training is known, the Manager, OPTI, shall direct a Training Coordinator to develop the TOPP Phase 2 Schedule.

5.6 Create the Instructor Training Schedule

- 5.6.1 OJT Instructor/Evaluator Program**
1. When two applications for OJT Instructor/Evaluator Qualification have been received, the Manager, OPTI shall publish and post a revision to the Annual Training Schedule for the next OJT Instructor/JPM Evaluator Training Program.
 - A. The start date for the next OJT Instructor/JPM Evaluator Training Program shall be no more than four (4) weeks from the date of receipt of the second application.


- 5.6.2 All Other Instructor Training Programs**
1. The Manager, OPTI shall publish and post a revision to the Annual Training Schedule of the start dates scheduled to provide all other required instructor training program(s), as described in SOP-RTMKTS.0200.0080 - Qualify OPTI Instructors

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6. Performance Measures

This procedure is deemed to be properly followed as evidenced by the following:

- The Annual Training Schedule for the next calendar year is published and distributed to VP, Operations; Director, Operations; Director, Operations Support Services; Director, Project Management Office; Managers, Hourly and Monthly Market Operations; M/LCC Heads; and M/LCC Trainers by September 1st
- The annual update to the Long Range Training plan is published and distributed to Director, Operations; Director, Operations Support Services; Director, Project Management Office; M/LCC Heads; and M/LCC Trainers by October 1st
- The Weekly Training Schedule is published by COB Wednesday the week preceding a cycle of training and distributed by email to: Director, Operations; Manager, OPTI; Manager, Control Room Operations; Control Room personnel; and M/LCC Trainers (for Joint Training only and email to the M S Trainers group address).
- The TOPP schedule is published to the OPTI SharePoint calendar within one (1) week of the development of a TOPP Phase 1, Phase 2 or Sprint schedule.
- The module schedule for the Instructor Training Program is published to the OPTI SharePoint calendar within one (1) week of the development of an Instructor Training Program schedule.

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7. References

NERC Reliability Standard EOP-005 - System Restoration Plans

NERC Reliability Standard EOP-006 - Reliability Coordination-System Restoration

NERC Reliability Standard EOP-008 - Plans for Loss of Control Center Functionality

NERC Reliability Standard NUC-001 - Nuclear Plant Interface Coordination

NERC Reliability Standard PER-004 -Reliability Coordinator - Staffing

NERC Reliability Standard PER-005 - System Personnel Training

NPCC CO2 Working Group on Dispatcher Training Charter

ISO Annual Corporate Goals Statement


Master/Local Control Center Procedure No. 16 - Seasonal Preparations (M/LCC 16)

Master/Local Control Center Procedure No. 17 - ISO and Local Control Center Joint Training (M/LCC 17)

SOP-RTMKTS.0200.0015 - Requesting OPTI Training and Changes to Training.


SOP-RTMKTS.0200.0025 - Maintain OPTI Records

SOP-RTMKTS.0200.0080 - Qualify OPTI Instructors

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8. Revision History

Rev. No.	Date	Reason	Contact
Rev 0	12/18/09	Initial draft procedure	Cheryl Robinson
Rev 1	07/18/11	<p>Biennial review by procedure owner;</p> <p>Global Updated copyright date and procedure owner in Header, replaced Footer page numbers with Page X of Y format;</p> <p>Global replaced Operational Performance and Training Department (OPTD) with Operational Performance, Training & Integration (OPTI) group;</p> <p>Section 1 added new NOTE and added new 2nd and 3rd sentences;</p> <p>Section 2 minor grammar changes, corrected M/LCC #17 title, Deleted “Joint” in 1st paragraph; corrected TOPP;</p> <p>Section 3.1.A added “site” Section 3.1.B replaced “Long Range Training Plan’ with “ Annual Training Schedule”; replaced retired Att A with new Att C, added new steps, added “training” and “TA” and “and publishing”, deleted former and added a new step 3.3;</p> <p>Modified Section 5.1 Title, modified step 5.1.1 and sub-steps, steps 5.1.2 75.1.3;</p> <p>Modified Section 5.2 title, modified step 5.2.1 and sub-steps A, B, C, D, E & F, & step 5.2.2, added new NOTE prior to step 5.2.3, modified step 5.2.3, 5.2.4 & bullets;</p> <p>Modified Section 5.3 title modified NOTE, deleted step 5.3.1 and substeps & added new step 5.3.1;</p> <p>Modified Section 5.4 title, step 5.4.1 and sub-steps, step 5.4.2, added new step 5.4.3 and deleted former step 5.4.3 and 5.4.4;</p> <p>Modified Section 5.5 title, added new sub-section 5.5.1, step 5.5.1.2, added new sub-section 5.5.2 title, deleted former steps 5.5.2.2 & 5.5.2.3, deleted former steps 5.5.2.6 & 5.5.2.7;</p> <p>Deleted Section 5.5.3;</p> <p>Added new Section 5.6, sub-sections, new steps and substeps;</p> <p>Section 6 modified 1st, 2nd & 3rd bullets, added new 4th and 5th bullets;</p> <p>Section 7 added PER-004, MLCC#17 & RTMKTS.0200.0080;</p> <p>Section 9 updated to reflect retiring Att A, and adding new Att C & Att D;</p> <p>Retired Attachment A;</p> <p>Modified Attachment B;</p> <p>Added new Attachments C and D</p>	Steve Weaver

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9. Attachments

Attachment A - Retired (mm/dd/yyyy)


Attachment B - Process Flow Create OPTI Training Schedules

Attachment C - Training Required by NERC Reliability Standards

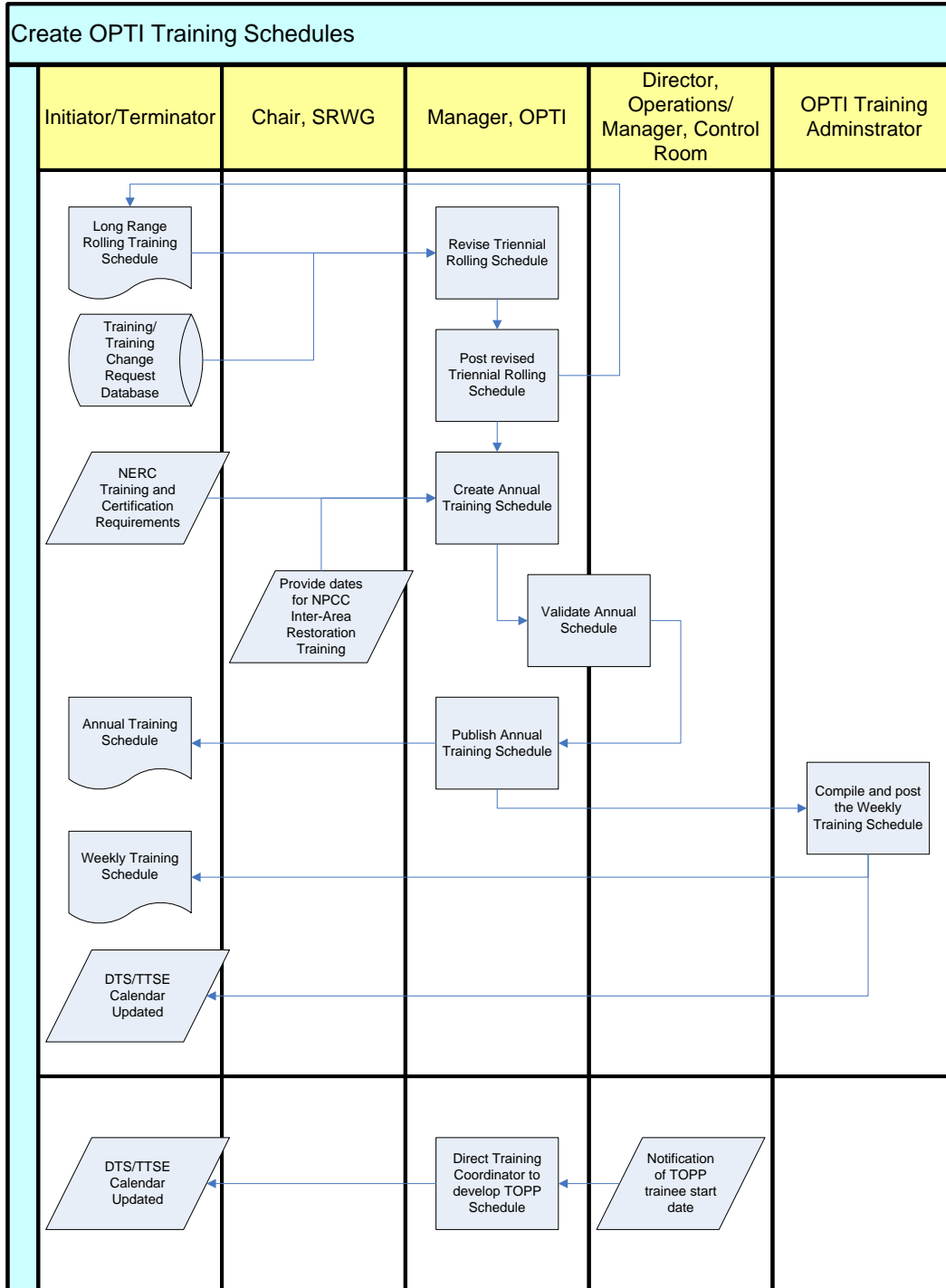
Attachment D - NERC Certification Maintenance Requirements


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Attachment A - Retired (mm/dd/yyyy)

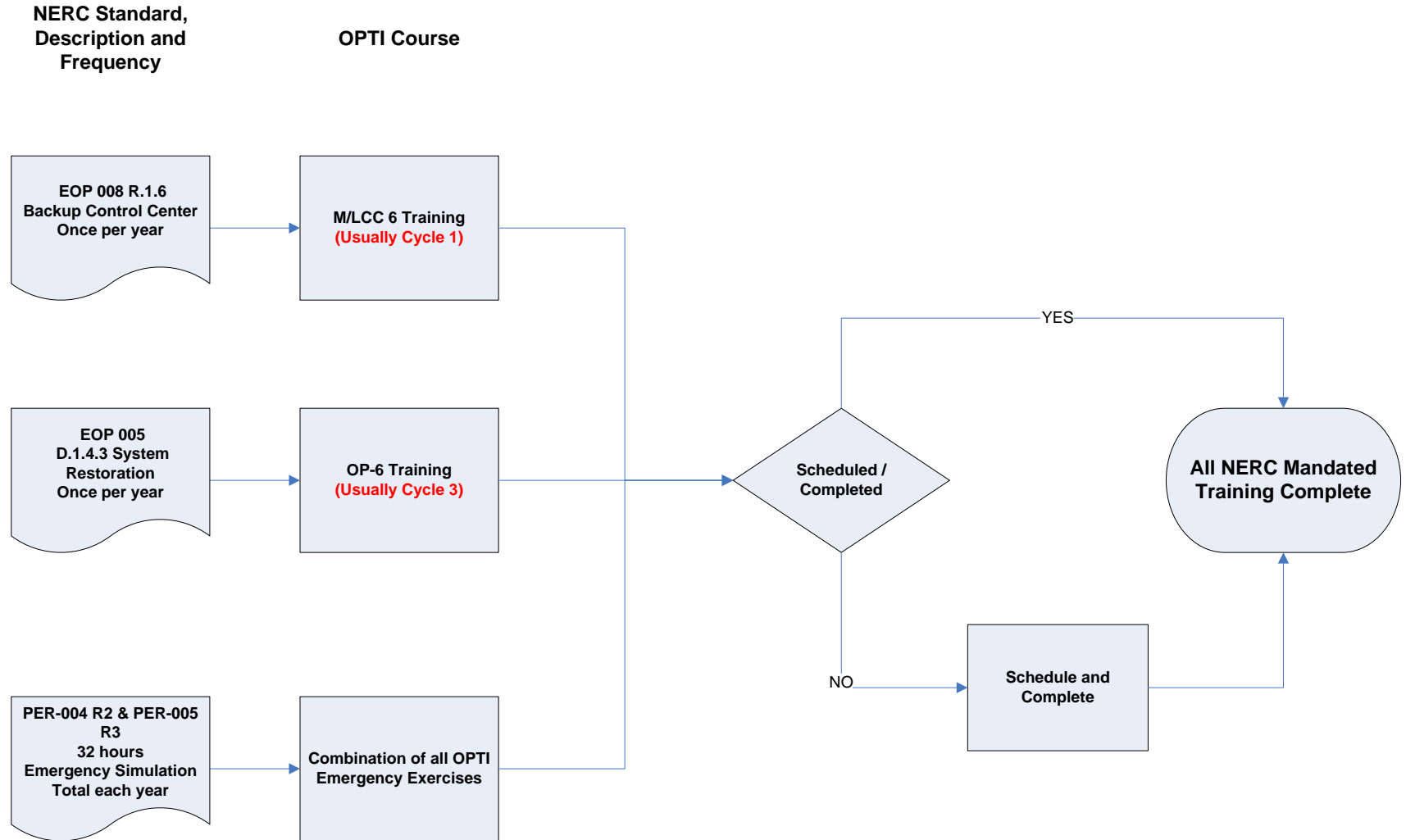
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Attachment B - Process Flow Create OPTI Training Schedules



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Attachment C - Training Required by NERC Reliability Standards



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Attachment D - NERC Certification Maintenance Requirements

(Reliability Coordinator)

