




System Operating Procedures

SOP-RTMKTS.0200.0055

Develop OPTI Test Items and Tests

Effective Date: July 18, 2011
Revision No. 1

	© ISO New England Inc. 2011	Procedure: Develop OPTI Test Items and Tests
	Process Name: Perform Operations Training	
	Procedure Number: RTMKTS.0200.0055	Revision Number: 1
	Procedure Owner: Steve Weaver	Effective Date: July 18, 2011
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SOP-RTMKTS.0200.0055

Develop OPTI Test Items and Tests

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1. Objective

NOTE


Before implementing any modification to current Operational Performance, Training & Integration (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 affected OPTI staff.

The objective of this procedure is to define and document the process OPTI uses for the development of test items and testing instruments for the evaluation of trainee mastery of instructional objectives. This procedure details the process to be applied to the formal mechanisms that document successful course completion only and not to casual measures that do not become documents of record. This procedure applies to the following OPTI programs: Training Operations Professionals Program (TOPP), Continuing System Operator Training, and OPTI Instructor Training Programs. The Program Descriptions for each of the programs are located on the Enterprise Document Library (EDL) in Real Time Markets, Related Documents.

2. Background


OPTI is responsible for providing training programs for System Operations Control Room System Operators, as well as providing selected training for other ISO personnel and personnel outside of ISO.

System Operations training programs are developed and executed in accordance with North American Electric Reliability Corporation (NERC) Reliability Standards, Northeast Power Coordinating Council Inc. (NPCC) policies and ISO policy and procedures. As such and particularly in conformance with both the letter and intent of PER-005, OPTI assumes responsibility for the development and implementation of the processes and standards necessary to ensure the validity and reliability of the training programs by adopting a systematic approach to all programs within its purview.

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3. Responsibilities


1. The Manager, OPTI (or designee) is responsible for:
 - A. Assigning the development of test items and/or instruments to a responsible instructor.
 - B. Ensuring the existence of a system to identify and address problems with the validity or reliability of test items or testing instruments.
 - C. Ensuring the availability of valid, reliable test items and testing instruments for use by instructors.
2. The Systematic Approach to Training Manager (SAT Manager) is responsible for:
 - A. Establishing the standards and processes for the development of test items and testing instruments that serve as formal mechanisms to document successful course and program completion.
 - B. Ensuring the adherence to these standards and processes by providing for the review of test items and test instruments against such standards prior to their use.
3. Responsible instructors are responsible for:
 - A. Developing test items and testing instruments to address instructional objectives derived from training requirements and based on content provided by Subject Matter Expert(s) (SMEs) within the respective discipline.
 - B. Conforming to the processes described in this procedure for the development, review, and submission of test items and testing instruments.
4. System Operators and/or other ISO staff designated by the Director, Operations as SMEs are responsible for providing content appropriate for the development of test items and tests as well as for the content review and approval of material used for testing purposes.

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5. OPTI Training Administrator (TA) is responsible for
 - A. Uploading approved test items to an appropriate Question Bank
 - B. Uploading all signed Attachment A - Written Test Item Approval forms to Share Point
 - C. Creating tests from approved test items and electronically filing them in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records

4. Controls

Test items and testing instruments provided by responsible instructors, as well as developed by qualified vendors, shall be subject to the processes, including review, described in this procedure.

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5. Instructions

5.1 Written Item and Test Development for Classroom Testing

5.1.1 Develop Test Item

1. The Manager, OPTI shall assign the development or revision of written test items and/or tests to an instructor, normally the same person responsible for instructional module development.


NOTE

Four test items or more per learning objective is ideal because it allows for easy development of a unique remediation exam.

2. The assigned instructor shall develop test items for each objective as follows:
 - A. No fewer than two test items shall be developed for testing of each objective.
 - B. The test item types used for ISO TEN administered tests shall be multiple-choice.
 - C. Test Item types for proctored paper exams shall include the fill in the blank, multiple-choice, completion, matching and drawing/labeling.
 - D. True or False test items shall **not** be used in any case.

5.1.2 Review and Approval Test Item

1. The assigned instructor shall submit the developed or revised written test items, with answers clearly indicated, and an Attachment A - Written Test Item Approval Form to the designated SME for technical review.
2. When technical approval has been obtained, the assigned instructor shall submit the developed or revised written test items and Attachment A - Written Test Item Approval Form to the Manager, OPTI for instructional review.
3. The Manager, OPTI shall either:
 - A. Using Attachment A - Written Test Item Approval Form, approve the developed or revised test items.
 - B. Return the unapproved items with comment to the responsible instructor.

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4. The Manager, OPTI shall convey the test items and Attachment A - Written Test Item Approval Form to the assigned instructor and to the OPTI TA for filing in the program records.


5.1.3 Develop Written Test

1. The assigned instructor shall:
 - A. No later than one (1) week prior to a written test use, perform the following:
 - (1) Using only approved test items, prepare a draft test using Attachment B - ISO-NE OPTI Test Form;
 - (2) If a proctored paper exam is to be used, prepare an Answer Key for the test,.
 - B. If the test is to be administered in ISO TEN, forward the final version of the written test items to the OPTI TA.
2. The OPTI TA shall:
 - A. Upload the approved test items into an appropriate Question Bank.
 - B. No later than two (2) days prior to its scheduled use, create a written test from the approved test items uploaded to the appropriate database and name it in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.

NOTE

When the ISO TEN database is used, test items successfully edited in the Question Bank will automatically update in any exam in which that test item appears and no new test version will need to be created. Editing test items in the exam will result in a new version of the exam being created, complicating the audit process.

- C. Edit existing test items or upload new test items to the appropriate ISO TEN Question Bank no later than COB Friday of week prior to either of following:
 - The first week of OPTI Cycle Training
 - The week the exam is to be administered.


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5.2 Develop Job Performance Measure (JPM)

NOTE

Normally the same instructor responsible for instructional module development is assigned development/generation of a JPM.

1. The Manager, OPTI shall assign the development/generation of a JPM to an instructor.
2. The instructor assigned development/generation of a JPM shall:
 - A. Develop/revise the JPM using Attachment D - Job Performance Measure (JPM) Form.
 - B. Submit the developed/revise JPM along with Attachment C - Job Performance Measure (JPM) Approval Sheet to the designated SME for review of technical content.
 - C. Forward the reviewed JPM to the Manager, OPTI (or designee) for instructional effectiveness review.
3. When a SME completes a technical review and approves a JPM, the Manager, OPTI shall review the JPM and perform one of the following:
 - Approve the JPM and forward the JPM to the OPTI TA
 - Return the annotated JPM to the assigned instructor for revision
4. Not more than one week after receipt of an approved JPM, the OPTI TA shall upload the JPM to the QTD in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.


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5.3 Develop Evaluated Exercise

NOTE

Normally the same instructor responsible for instructional module development is assigned development/revision of an Evaluated Exercise.

1. The Manager, OPTI shall assign the development/revision of an Evaluated Exercise to an instructor.
2. The instructor assigned to develop/revise an Evaluated Exercise shall:
 - A. Develop or revise the Evaluated Exercise using Attachment G - Evaluated Exercise Form and Attachment I - Evaluated Exercise Evaluation Form.
 - B. Submit the developed/revise Attachment G and Attachment I along with Attachment E - Evaluated Exercise Approval Sheet, and Attachment F - Evaluated Exercise Brief to the designated SME for review of technical content.
 - C. Forward the SME-reviewed Evaluated Exercise package (Attachments E, F, G and I) to the Manager, OPTI (or designee) for instructional effectiveness review.
3. The Manager, OPTI shall review the Evaluated Exercise package and perform one of the following:
 - Approve and forward the Evaluated Exercise package to the OPTI TA
 - Return the annotated Evaluated Exercise package to the responsible instructor for revision
4. Not more than one (1) week after receipt, the OPTI Training Administrator shall save the Evaluated Exercise package in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.

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6. Performance Measures

Written test items shall be evaluated for reliability after each course implementation using the test item analysis techniques described in SOP-RTMKTS.0200.0060 - Implement OPTI Training.

The effectiveness of all testing instruments shall be evaluated in accordance with SOP-RTMKTS.0200.0070 - Evaluate OPTI Training Program Effectiveness.

7. References

NERC Reliability Standard PER-005 - System Personnel Training

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


SOP-RTMKTS.0200.0025 - Maintain OPTI Training Records

SOP-RTMKTS.0200.0060 - Implement OPTI Training

SOP-RTMKTS.0200.0070 - Evaluate Training Program Effectiveness

8. Revision History

Rev. No.	Date	Reason	Contact
0	12/11/09	Initial draft procedure	Cheryl Robinson
1	07/18/11	Biennial review by procedure owner; Updated copyright date and procedure owner in Header; Replaced page numbers with Page X of Y format; Global replaced Operational Performance and Training Department with Operational Performance, Training & Integration group and replaced OPTD with OPTI; Modified Section 1 and added a NOTE; Deleted Section 3.1; Modified Section 3.4; Modified Sections 5.1.1.2, 5.1.2.1, 5.1.2.2, 5.1.2.4, 5.1.3.1, 5.1.3.2, 5.2.2, 5.3.2, & 5.3.3; Attachment A added signature block for technical reviewer; Attachment D Revised JPM form to reflect QTS report; Attachment E added block for Course ID &, Type of Course ID; New Attachment H modified process flow to reflect SOP changes; Attachment I added Evaluated Exercise Evaluation Form	Steve Weaver

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9. Attachments

Attachment A - Written Test Item Approval Form

Attachment B - ISO-NE OPTI Written Test Sheet

Attachment C - Job Performance Measure (JPM) Approval Sheet

Attachment D - Job Performance Measure (JPM) Form


Attachment E - Evaluated Exercise Approval Sheet

Attachment F - Evaluated Exercise Brief

Attachment G - Evaluated Exercise Form

Attachment H - Process Flow Develop OPTI Test Items and Tests

Attachment I - Evaluated Exercise Evaluation Form

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Attachment A - Written Test Item Approval Form

Program: _____

Inclusive Test Item Number: _____

Developer: _____ Date: _____


Reviewed/Approved:

_____ Date: _____

Technical Reviewer (SME)

_____ Date: _____

SAT Manager

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Attachment B - ISO-NE OPTI Written Test Sheet

201_ Cycle _ Session _
Written Examination

Examinee: _____ Final Grade: _____

Examination Number: _____ Developed by: _____

Date Administered: _____ Approved by: _____

**This document contains examination material.
Unauthorized use is prohibited.
If found, please return to ISO-NE Training Coordinator.
This will prevent Unauthorized use of this information.**

Instruction to the Examinee:

1. Talking during the examination is strictly forbidden.
2. If a question is not understood, raise your hand so that a proctor/examiner may assist you.
3. All required reference materials will be provided by the proctor/ examiner.
4. Cheating in any form is forbidden and can result in a recommendation for disciplinary action.
5. The passing grade requires a final grade of at least 75% .
6. The total duration of this examination shall be _____ hour.


By signing below, I certify that all work done on this examination is my own.

Trainee Name (Print): _____

Trainee Signature: _____

I have reviewed the exam.

Trainee Signature: _____

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1. Question....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer

2. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer


3. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer

4. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer

5. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer

6. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer

7. Question.....
 - a. Answer
 - b. Answer
 - c. Answer
 - d. Answer


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Attachment C - Job Performance Measure (JPM) Approval Sheet

- I. JPM Title: TYPE JPM TITLE
 JPM Number: TYPE JPM NUMBER Revision:
- II. Initiated: _____ Date: _____
 Developer
- III. Reviewed: _____ Date: _____
 Technical Reviewer
- IV. Approved: _____ Date: _____
 Manager, OPTI

SUMMARY OF CHANGES

A/I & DATE	DESCRIPTION	REV/CHANGE
	Original	A

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Attachment D - Job Performance Measure (JPM) Form

Evaluator(s):
OJT Training Item:
Evaluation Date: Scenario Duration (hours):

Position Evaluated	Name and Date (m/d/yyyy)
<input type="checkbox"/> Supervisor	
<input type="checkbox"/> Senior	
<input type="checkbox"/> Loader	
<input type="checkbox"/> Generation	
<input type="checkbox"/> Security	

Did the Trainee successfully perform the OJT Item? Select One Y N

Conditions:	
Criteria/Standard:	
Tools:	
References:	
Procedures:	

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Employee OJT Records

Operator: _____


Date Administered: _____

Control Room Position: **Generation/Loader/Transmission/Senior/Shift Supervisor**

Complete	Task #	Task Description	Comments
Task Title (TX.1, RV.X)			
<input type="checkbox"/>	N.X.1.1	Step one to accomplish the task	
<input type="checkbox"/>	N.X.1.2	Step two to accomplish the task	
<input type="checkbox"/>	N.X.1.3	Step three to accomplish the task	
<input type="checkbox"/>	N.X.1.4	Step four to accomplish the task	
<input type="checkbox"/>	N.X.1.5	Step five to accomplish the task	
<input type="checkbox"/>	N.X.1.6	Step six to accomplish the task	
<input type="checkbox"/>	N.X.1.7	Step seven to accomplish the task	
<input type="checkbox"/>	N.X.1.8	Step eight to accomplish the task	

OJT Instructor (Print): _____


OJT Instructor Signature: _____

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Attachment F - Evaluated Exercise Brief

Overview

1. The purpose of the Evaluated Exercise is to evaluate the Shift capability, as a team and individually, to operate the power system during normal and abnormal operating conditions. To include:
 - a. Performance of Shift dependent and time-critical tasks.
 - b. Ability of the Shift to (Shift Brief only):
 - 1) Understand/interpret alarms and system response
 - 2) Diagnose events/conditions based on indications
 - 3) Comply with/use procedures
 - 4) Properly use software tools
 - 5) Properly communicate information
 - c. Ability of each individual to:
 - 1) Respond and correctly interpret indications and system response
 - 2) Correctly diagnose events
 - 3) Comply with/use procedures
 - 4) Properly use software tools
 - 5) Properly communicate information and interact with rest of Shift
2. Operate the TTSE as if it were the actual control room.
3. The Shift/Individual should keep the log during each scenario.
4. An instructor will perform all of the functions of anyone needed outside the control room area.
5. An instructor will provide the information for a shift turnover before the scenario begins. This information will include present conditions, equipment out of service, abnormal conditions, and instructions.
6. Before the Shift/Individual Evaluated Exercise begins, you may review the status and conditions of the system for up to ten minutes.

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7. Before the examination begins, you should ask any questions concerning the administration of the operating test.
8. The examination team evaluates teamwork skills and communication during the simulator evaluated scenario. The examination team evaluates the Shift's ability to operate the system and the performance of both the individuals and the Shift. (Shift briefing only)
9. If you recognize an incorrect decision, response, answer, analysis, action, or interpretation by another member of the Shift, but fail to correct it, then the examiner may assume that you agree with the incorrect item. (Shift briefing only)
10. The simulation will be debriefed.
11. Turnover Brief:
12. Simulator differences that may affect scenario:
13. Duration:

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Attachment G - Evaluated Exercise Form


Scenario Title: Type Title Here	Scenario Number: Type No. Here
Initial Conditions: Type Relevant Initial Conditions	
Event Recognition: Describe Scenario	
Reference: List Applicable References	
Tools: List Required Tools and Materials	
Communication: List Outside Communications	



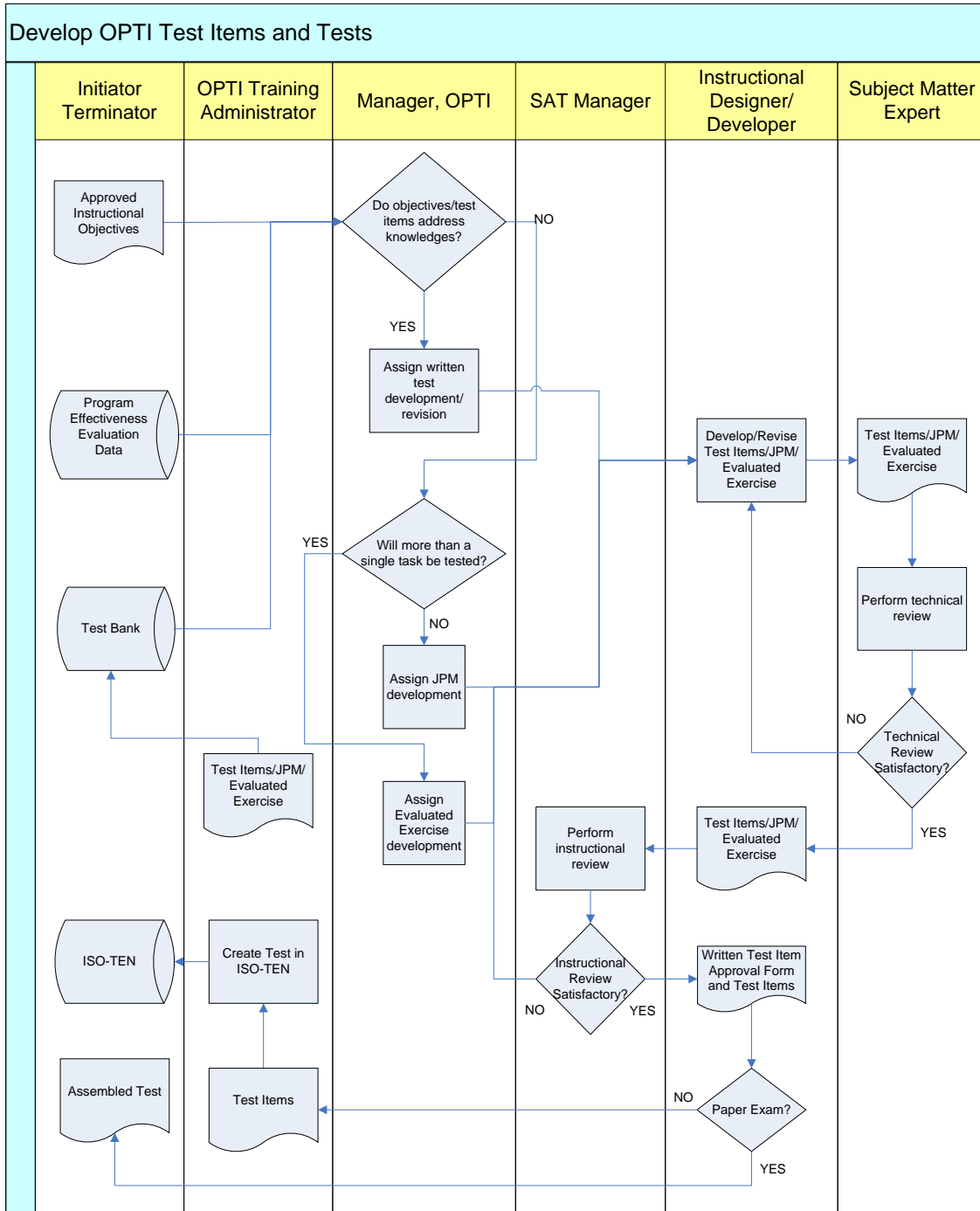
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Scenario Title:			Scenario Number:			
Instructor Info/Activity	Time	Expected Action	Position	CS	Reference	IO
	T ₀			Yes		
				Yes		
				Yes		
				Yes		
				Yes		
				Yes		
				Yes		
				Yes		
				Yes		
				Yes		

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Attachment H - Process Flow Develop OPTI Test Items and Tests



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Attachment I - Evaluated Exercise Evaluation Form

Evaluator(s): Evaluator Name

Scenario: Scenario Title

Course ID: ILA Course ID

Training Date: Date of Training

Training Duration (hours): Hours

Position	System Operator
Supervisor	
Senior	
Loader	
Generation	
Security	

Did the Team successfully perform all Team critical tasks? Y / N


Overall Team Evaluation: Y / N

Individual Evaluation: Y / N

Remediation Necessary: Y / N


Comments:

If required, Remediation Complete: _____

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Evaluation Standard for Evaluated Exercise:

- Rating Scale is as follows:
 - A score of 3 in a category indicates that the Team or individual completed the task consistent with recognized best practices
 - A score of 2 in a category indicates that the team or individual completed the task adequately, the system was maintained in a safe condition but recognized best practices were not used.
 - A score of 1 in a category indicates that the Team or individual did not complete the task or that the system integrity was in jeopardy in the effort to complete the scenario.
- Any two ratings of “1” in any objective for either the Team or an individual will result in an unsatisfactory evaluation.
- A Team or individual shall be evaluated as unsatisfactory if an objective rating of “1” is received for any one critical task.
- Remediation of the scenario shall be performed in one or all the following means based on the judgment of the evaluation team:
 - Follow-up questions on failed objective(s) may be used to remediate any individual or team failures on the simulator exercise.
 - Team or individual remediation may be accomplished by performing an alternate simulator exercise that is designed to evaluate the same tasks as the original exercise.

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OBJECTIVE 1: Objective Statement

Did the Team/individual:

1. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.


2. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

3. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

COMMENTS: _____

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	Procedure Number: RTMKTS.0200.00550	
	Procedure Owner: Steve Weaver	Effective Date: July 18, 2011
	Approved By: Director, Operations	Valid Through: July 18, 2013

OBJECTIVE 2: Objective Statement

Did the Team/individual:

1. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.


2. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

3. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

COMMENTS: _____

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2. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

3. Performance Criteria

3	2	1
Click here to enter text.	Click here to enter text.	Click here to enter text.

COMMENTS: _____

