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Technical Training Guidelines

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Document retained within
Technical Training Group*

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1. Application

This document defines how technical training will be provided for staff in each of the TransGrid workgroups. It outlines the responsibilities of:

- Individuals participating in training;
- Team Leaders of participating staff;
- Technical Training Manager and
- Other parties involved in the training process.

2. Scope

The process is restricted to Technical Training for power workers, trade level and Engineering Officer staff, and covers training identified in individual *Skills Development Programs (SDP)* and *Employee Development Programs (EDP)* for Substations, Lines, Easements, Communications and Secondary Systems participating in:

- Technical training based on National *Competency Standards*;
- Technical training based on TransGrid enterprise standards; and
- *Technical Refresher training* (in accordance with NENS or ESAA guidelines).

Technical training will be provided to enable a person to meet the requirements of their Position Description. Training will (wherever possible) be based on National *Competency Standards* or other recognised technical qualifications/credentials and the training pathway will be detailed in individual Development Programs in accordance with TransGrid Performance Management processes.

Competency Standards will generally form the basis of training for individuals undertaking Technical Training. However, training need not be limited to the content of appropriate *Competency Standards* and additional training can be provided as required on the advice of Team Leaders/Managers.

3. Reference Documents

- GD ES G2 066 Training and Assessment in TransGrid
- BS TT G2 006 Accredited Trainers and Assessors
- Salary Progression
- Performance Review

4. Definitions

Assessment Event

An event associated with on-the-job training used to evaluate an individual's competency in a particular work task. Can be carried out on the job either by another experienced staff member, or by a *Accredited Assessor*.

Competency Standards

A set of statements which details the performance expected of a competent person in the workplace.

Employee Development Program (EDP)

A document detailing an individual's agreed training and development opportunities for Engineering Officers.

Formal Assessment Event

Same as for *Assessment Event* except that this is the final assessment for any particular *unit* identified in a set of *Competency Standards* and must be carried out by a *Accredited Assessor*.

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Maintenance Scheduled Tasks (MST)	A routine work task identified in the Works Management System.
Accredited Trainer and Assessor	A person with appropriate qualifications and experience as set out in BS TT G2 006 who is accredited by the Technical Training Manager to delivery training in, and assess the outcomes of Skills Development Programs.
Recognition of Current Competence	A form of assessment used to determine whether an employee has achieved the required competencies through appropriate work experience.
Skills Development Program (SDP)	A document detailing an individual's agreed training and development opportunities in the SP13 -17 range.
Technical Refresher Training	Technical training which has been requested by an individual or a Team Leader which is not detailed in a <i>SDP</i> or an <i>EDP</i> .
Unit	A particular module identified in the appropriate <i>Competency Standards</i> .

5. Actions and Responsibilities

5.1 Skills Development Programs

5.1.1 Progression

Progression under a *Skills Development Program* will be based on the acquisition of the knowledge and skills identified in a *Unit* of Competence, and the application of that knowledge and skill on the job.

5.1.2 Staff currently undertaking technical training under an existing *SDP*

Staff who have been undertaking technical training in line with a *SDP* prior to the implementation of a standards based program will be transferred over to a new *SDP* based on the appropriate *Competency Standards*. Where staff members have been acquiring the "on the job" experience, they can have their current skills recognised (as described in section 4.8 *Recognition of Current Competence*).

Under no circumstances will staff in this category be disadvantaged by transferring to a new program.

5.2 Employee Development Programs

5.2.1 Progression

Employee Development Programs will be devised and administered in accordance with the Performance Management procedures. *EDP's* can include *Units* of Competence from one or more *Competency Standards* and include:

- Technical *units*
- Management *units*
- Non-technical *units*

Progression under an *Employee Development Program* will be based on the acquisition of the knowledge and skills identified in each *Unit* of Competence, and the application of that knowledge and skill on the job.

5.3 Technical Currency

5.3.1 Existing experienced staff

The skills, knowledge and attitudes set out in the appropriate technical *Competency Standards* (with the exception of the Live Line standards) will have a technical currency of 3 years. Staff members who have not participated in an *MST* (described by the appropriate *Competency Standards*) within the technical currency period and who are required to comply with those Standards will be required to undertake refresher training to maintain competence.

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5.3.2 Technical Refresher Training Requests

Refresher training will be made available at the request of any person in the workgroup in conjunction with the agreement of their Team Leader/Manager and will be based on *units* identified in the appropriate *Competency Standards*

5.4 Training Provision

Training will be provided in accordance with GD ES G2 066 Training and Assessment in TransGrid. However, wherever possible Technical training will be carried out on-the-job in conjunction with normal work duties. Where off-the-job training is necessary, this is to be coordinated between the Technical Training Manager and the appropriate Team Leader/Manager with a view to providing cost effective, relevant training based on business needs.

Assessment events (knowledge and/or Competency based) will apply to training which is provided to address the requirements of a *Skills Development Program (SDP)* or an *Employee Development Program (EDP)*.

Where a Manager/Team Leader requests training to address particular business needs (refresher training etc), requirements for *assessment criteria* will be specified by the appropriate Manager/Team Leader.

5.4.1 Individuals involved in the Training Process

Individuals are required to participate in the training and development:

- outlined in their *SDP/EDP*
- specified by a refresher training request.

It will be the responsibility of each individual to complete the assessment tasks required for each *unit* (if appropriate).

5.4.2 SDP/EDP Assessments

Assessments for Technical Training based on appropriate *Competency Standards* require the individual to complete at least 2 on the job *assessment events*. Each assessment will focus on the skills, knowledge and attitudes required to competently carry out the particular technical task. Judgements of competence are not based on scores but on whether individuals are 'Competent' or 'Not-yet-competent' according to the standards. Persons engaged in technical training will be provided with copies of the practical assessment requirements at the start of training.

Assessments reflect the requirements of the appropriate *Competency Standards* and staff undertaking training will be considered 'Not-yet-competent' until they provide sufficient evidence for a judgement to be made otherwise.

5.4.2.1 Informal Assessments

Any assessment other than formal assessments are considered to be informal and are designed to provide the person with workplace practice opportunities. The person may be part of a larger work team responsible for completing the work or under the direct supervision of an already appropriately qualified and/or experienced person. In such situations the qualified/experienced person will act as the Assessor and make use of the Assessment Package to record the on-the-job performance of the individual. At least one informal assessment record is required to be completed and submitted to the Technical Training Manager before a formal assessment can be attempted.

5.4.2.2 Formal Assessments for National Competency Standards

The final *assessment event* for Units of Competence under a National Training Package shall be carried out by an independent *Accredited Assessor* (from another workgroup) and will also include a written or online knowledge test. This may be completed prior to the on-the-job assessment. All knowledge based assessments will be conducted under "test" conditions and will not be available for other than formal assessments.

Applications for Formal Assessment shall be considered only where the applicant has met the appropriate work experience requirements of the Unit. Written applications from the applicants Team Leader or Manager should be provided to the Technical Training Manager who will arrange an appropriate *Accredited Assessor*.

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The *assessment event* will be flexible enough to allow the trainee to be assessed at the appropriate time and fit in with the work group's maintenance program.

Formal assessments require the individual to complete the practical portion with complete accuracy (100%) whilst the technical knowledge assessment requires at least 85% pass and the safety aspects require a 100% pass for a judgement of competent to be made.

5.4.2.3 Formal Assessment for TransGrid Competency Standards

The final assessment event for TransGrid Units of Competence shall meet the requirements detailed in section 4.4.2.2 with the exception that the Accredited Assessor does not need to be from another workgroup. Such assessments do not meet the requirements of National Training Packages and are intended only to meet local requirements for salary point progression.

5.4.3 Timing of Assessment Events

The timing of each *assessment event* will be determined by the type of assessment to be carried out. Where the assessment is to be the first (informal) event for a particular *unit*, the assessment can be carried out at the discretion of the individual. Where the assessment is to be the final (formal) *assessment event* for that *unit*, the timing will depend upon the following limitations:

- Assessment times will need to be coordinated within outage constraints/work requirements
- Assessment will be contingent upon the allocation and availability of *Accredited Assessors*
- Individuals must have completed all prerequisite assessment tasks for a *Unit*

Note 1 Where local outage requirements prevent an individual from completing a particular *Formal Assessment Event* the person can apply to the Technical Training Manager and request a formal assessment in another Region. *Formal Assessment Events* will be arranged with minimal disruption to the Transmission Network and with due regard to issues of fairness and equity for the individual.

Note 2 Where an independent *Accredited Assessor* is not available, the Technical Training Manager will make all reasonable efforts to ensure a suitably qualified and experienced Assessor is made available as soon as practicable (eg. Technical Trainer).

5.4.4 Assessment packages

Accredited Assessors will be provided with an Assessors Package for each *Unit* in which the person is to be formally assessed. Each Assessment package will detail the responsibilities of each individual involved in the process (refer to BS TT G5 001 Practical Assessment Template).

These prompts will cover the arrangements the assessor needs to make with the other parties involved in the process to ensure the assessment runs smoothly and is of a consistently high quality.

The critical points in the process will include

- Arranging with the Team Leader and the individual where and when the assessment will take place;
- Identifying the equipment type to be maintained and/or what type of task will be carried out;
- Providing the individual and the Team Leader with an intended Assessment Agenda prior to the *assessment event*; and
- Discussing with the work Team the issue of Teamwork and the contribution of other Team members during the assessment so as not to compromise the assessment process.

The outcomes of *Formal Assessment Events* will be recorded in accordance with BS TT G5 001.

5.5 Training Records

Technical Training records of each individual's training and assessment will be stored in the Training database. Training records can ONLY be entered by Technical Training staff nominated by the Technical Training Manager.

As a minimum these training records will consist of the following:

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- Each person's name, location and Service Number
- Details of nominated *Competency Standards* which apply (contained in individual *SDP/EDP*)
- Details of any face to face sessions attended
- Details of any formal assessment outcomes (both practical and knowledge assessments)
- Qualifications/Certification acquired, including:
 - Certificate number
 - *Units* of Competence which apply
 - Date of completion
- Details of any re-certification required (if *currency* applies)
 - Period of Certification
 - Duration of currency
 - Validity of certification

The Training Database can be interrogated by individuals participating in training through the 'Reports' menu using a nominated password (refer to BS TT G2 010 Training Database User Manual). Training records will be kept secure and maintained in accordance with TransGrid Information Systems policies and procedures.

5.6 Responsibilities

5.6.1 Individuals

Individuals shall:

- Assist the Team Leader when planning an appropriate *SDP/EDP*;
- Engage in nominated training programs listed in the *SDP/EDP*;
- Complete all required *assessment events* for nominated training programs in the *SDP/EDP*;
- Signify agreement by signing the *SDP/EDP* document;
- Upon request, provide the Team Leader with relevant information regarding evidence of competence (as required);
- Provide the Team Leader with a request to be assessed for the *Formal Assessment Event*;
- Prepare for *Formal Assessment Events* by:
 - Ensuring all relevant documentation necessary for the job being assessed is available;
 - Presenting the Assessor with relevant documentation to support the Assessor's judgement of competence (as required);
 - Ensuring all tools and equipment are available for the *assessment event* and that they are in correct working order;
 - Maintaining safe working conditions throughout the *assessment event*;
 - Completing all steps in the *assessment event* as required;
- Abide by the Assessors judgment and signify agreement by signing the Assessment Record of Competence; and
- Contest the outcomes of *Formal Assessment Events* only in accordance with the provisions of this guideline.

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5.6.2 Accredited Trainers and Assessors

Accredited Assessors (and Technical Training staff) engaged in *Formal Assessment Events* for an *SDP/EDP* shall carry out assessment in accordance with the instructions set out in the appropriate Assessment Package.

Accredited Trainers and Assessors engaged in training and assessment for *Technical Refresher Training* shall:

- Confirm the timing and date of the proposed training/assessment;
- Conduct themselves in a professional manner at all times and carry out assessments as unobtrusively as possible;
- Ensure all relevant information and documentation necessary to conduct the training/assessment is readily available;
- Answer all questions and enquiries from individuals in a responsible manner;
- Conduct the assessment fairly;
- Ensure any judgements made regarding assessments are based on objective evidence;
- Ensure the safety of the work group during training/assessment within the constraints of the situation;
- Prior to training/assessment ensure each person understands the level of performance expected;
- Discuss what will constitute a judgement of 'competent' or 'not-yet-competent' and provide individual's with an opportunity to clarify any misunderstandings or points of confusion;
- Ensure check sheets and (if required) knowledge tests are signed off by both assessor and trainee at the completion of the assessment;
- Provide the trainee with feedback and advice regarding their performance and any necessity for future certification/re-certification; and
- Report to the person's Team Leader and the Technical Training Manager the outcome of the training/assessment including advice regarding a Competent/Not yet competent judgement.

5.6.3 Team Leaders/Managers

Team Leaders shall:

- Plan appropriate Development Programs:
 - For each Team Member in accordance with TransGrid policy and procedure
 - In consultation with the affected individual(s)
 - To meet the business needs of the work group
- Review and Revise an individual's *SDP/EDP* to suit the individual's/Team job requirements in consultation with the individual;
- Upon completion of agreed stages in the *SDP/EDP* forward the necessary documentation and recommendations for progression to the appropriate Manager;
- Signify agreement by signing the *SDP/EDP* document, and provide a copy to the Technical Training Manager;
- Upon receipt of a request for formal assessment from individuals undertaking training, inform the Technical Training Manager in writing (e-mail) of the request within one week of that receipt;
- Inform the Technical Training Manager of any issue regarding the contestability of an *assessment event* within one week of receiving the notice;
- Provide relevant information, documentation and assistance necessary to allow an individual to meet the relevant performance criteria in the nominated *Competency Standards*;
- Provide individuals with adequate opportunity to learn and gain experience in tasks on plant and

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apparatus, within the constraints imposed on the Team (Outage availability etc);

- Abide by the judgements made by Assessors regarding the competence of an individual;
- Respond to an individual's request for refresher training in writing (e-mail); and
- Plan training in consultation with the individual and document the agreed training requirements in the *SDP/EDP*.

5.6.4 Technical Training Manager

The Technical Training Manager will:

- Ensure training and assessment for technical training is provided in accordance with GD ES G2 066 Training and Assessment in TransGrid and this document;
- Ensure appropriate *Competency Standards* are kept up to date and that they are available to each of the Network workgroups;
- Ensure that training packages are made available for any *unit* described in the appropriate *Competency Standards*;
- Maintain a register of suitably qualified *Accredited Trainers & Assessors*;
- Maintain a training record system for each person engaged in technical training;
- Ensure technical training records are:
 - Maintained for 30 years;
 - Stored in a secure location with defined limits of access;
 - Backed up in accordance with TransGrid policies and procedures;
 - Available to individuals and Team Leaders upon request;
- Manage access levels to the Training Database;
- Provide written advice regarding the outcome of any *Formal Assessment Event* to individuals and their Team Leader;
- Assist in arranging *Formal Assessment Events* in another Region as required
- Provide assistance to individuals and Team Leaders where the outcomes of a *Formal Assessment Event* are being contested;
- Provide assistance/advise to individuals with regard to technical training where necessary; and
- Provide any appropriate Technical Training documentation required by individuals and Team Leaders upon request.

5.7 Contestability of Formal Assessment Events

Individuals can contest the outcome of a *Formal Assessment Event* based on:

- Non compliance with the assessment process;
- Language and/or literacy difficulties with regard to written *assessment events*;
- Insufficient time allocated for assessment preventing the individual from providing sufficient evidence of competent performance; or
- An assertion that the assessment requirements were not adequately covered in the training program.

Individuals who contest a *Formal Assessment Event* must provide supporting evidence for contesting the outcome. Any individual contesting the outcome of a *Formal Assessment Event* must do so in writing by informing their Team Leader and the Assessor within one week of the *Formal Assessment Event* outlining the reasons based on the criteria listed above.

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The Technical Training Manager will negotiate with the individual and their Team Leader/Manager to arrange an independent arbiter for any contestable issue. The results of the independent review of contested Assessment Outcomes will be presented to the individual and the Technical Training Manager in writing and any remedial action required will be arranged by the Technical Training Manager and completed within an agreed timeframe.

5.8 Recognition of Current Competence

Staff in the technical workgroups with appropriate work experience undertaking development programs can apply to have their existing current skills recognised formally, without participating in technical training.

Where the individual believes that they can satisfy the Performance Criteria described in the appropriate *Competency Standards*, credit for that performance will depend on:

- Providing sufficient written evidence supporting the Performance Criteria and:
- Submitting a *Recognition of Current Competence* checklist (to be completed by the individual's Team Leader) to the Technical Training Manager together with evidence supporting the Performance Criteria. This checklist will be available from the Technical Training Manager upon request.

Applications for *Recognition of Current Competence* will only be considered:

- Where the individual has been engaged in the appropriate technical work tasks for at least six (6) month's and has completed a minimum of six (6) documented occurrences where the person was responsible for completing the work identified in the *unit* of competence;
- or
- Where there is no formal training program or package available for the *Unit* identified in the *RCC* submission. In such situations the person shall provide the Technical Training Manager with evidence of at least six (6) month's practical experience and/or a minimum of six (6) documented occurrences where the person was responsible for completing the work identified in the *unit* of competence.

The completed checklist and supporting documentation will then be forwarded to the Technical Training Manager for appropriate consideration and processing in accordance with established policies and procedures.

6. Implementation Plan

This procedure is to be disseminated to the following staff:

- all Business Unit Training Coordinators
- Transmission Operations Regional Managers and Group Managers
- Regional Training Coordinators
- All Accredited Trainers and Assessors
- All Technical Training staff
- Mandatory Training Officer

7. Attachments

Nil

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8. Amendments from Previous Issue

Document Number has changed from GM TT G2 003 to BS TT G2 003.

Cover sheet amendment – Approved: Network BD&T Manager has been changed to Approved: Manager/Human Resources.

Reference relating to Technical Training Group's documents that start with GM TT XX XXX and/or BT TT XX XXX have been changed to BS TT XX XXX.

Any reference to Business Services/Human Resources Training Manager or NBD& T Manager in the document has been changed to Technical Training Manager.