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## QUALIFICATION AND TRAINING

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BGS-TR-01

Revision 0

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Effective Date 3/31/16

<b>FUNCTIONAL AREA: Training</b>	<b>BGS-TR-01</b>	
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### Revision History

Rev. #	Date	By	Type <sup>1</sup>	Changes
0	2/22/16	S. Lambert	M	<ul style="list-style-type: none"> <li>-Initial issue of BGS-TR-01</li> <li>-For historical revision history BGS-QA-01, 1mc1</li> <li>-Update formatting</li> <li>-Respond to deficiencies identified in DOE EM-PA-15-03</li> <li>-Provide clarification of steps to accurately reflect process.</li> <li>-Remove nuclear projects and replace with Quality Levels (QL-2 and QL-3)</li> <li>-Removed the requirement for the Training Tracking Matrix to be a QA record</li> </ul>

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<sup>1</sup> M = major change, mc = minor change, N = new

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## 1. PURPOSE

This procedure establishes the method and process for ensuring personnel are trained, qualified, and capable of performing assigned work.

## 2. SCOPE

This procedure applies to personnel that perform or manage quality affecting activities for programs or projects.

## 3. REFERENCES

- 3.1. BGS-QAP-01, *Corporate Quality Assurance Plan*
- 3.2. BGS-HR-01, *New Personnel*
- 3.3. BGS-MG-03, *Management Assessments*
- 3.4. BGS-PC-01, *Procurement* (formerly BGS-QA-04)
- 3.5. BGS-QA-03, *Graded Approach*
- 3.6. BGS-RM-01, *Quality Assurance Records* (formerly BGS-QA-17)

## 4. DISCUSSION AND OVERVIEW

- 4.1. Training will be commensurate with scope, complexity, importance of activity and the education, experience, and proficiency of the person.
- 4.2. Personnel are hired based on their education and experience as evidenced by their job application and/or resume.
- 4.3. BGS personnel that are deployed to other sites will complete any training identified by the host.
- 4.4. BGS utilizes two types of training methods (RR and briefings). If it is determined during the course of work that additional, more in-depth types of training are needed (i.e., exams or on-the-job), then BGS will either update this procedure, write a new procedure or purchase qualified services.
- 4.5. BGS does not have an automated training system to deploy RR or record evidence of training completion. If/when a system is identified, procured, installed and deployed, then this procedure will need to be updated to reflect the change in the process.
- 4.6. Training that has been identified by the Functional or Project Managers shall be completed prior to commencement of work.

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## 5. DEFINITIONS AND ACRONYMS

<b>Briefing</b>	One-on-one discussions and/or classroom type setting.
<b>DCA</b>	Document Control Administrator
<b>Functional Manager (FM)</b>	Is a person who has management authority over an organizational unit, such as department, within BGS. BGS identifies and assigns individuals to functional areas (ie; Accounting, Quality Assurance, Information Mnaagement, Business Development, etc.).
<b>Project Manager (PM)</b>	Is a person assigned to manage staff and activities providing services and are responsible for project performance and on-time delivery of quality products.
<b>Quality Level (QL)</b>	A method of applying a graded approach to ensure managerial controls over items, activities and services is commensurate with the level of associated risk. Reference BGS-QA-03.
<b>Required Reading (RR)</b>	A formal method to disseminate information (i.e., documents, procedures or instructional material etc.) by requiring personnel to confirm they have read the information.
<b>Training Needs Determination (TND)</b>	A TND documents an FM's or PM's decision on what RR is needed.
<b>Target Audience</b>	Personnel who need to complete RR or a briefing.
<b>Training Manager (TM)</b>	The person responsible for managing BGS's training program.
<b>Training Tracking Matrix (TTM)</b>	Since BGS does not have an automated learning management system, a MicroSoft Excel spreadsheet is utilized by the TM as a tool to track training completion. The TTM is intended to be a living document for the TM's use only.
<b>Training Support Staff (TSS)</b>	Personnel to which the Training Manager can delegate any of the TM responsibilities listed in this procedure.
<b>Work Aid (WA)</b>	A document that supplements an upper tier governing document and is intended to provide additional detail for a specific task. Training requirements for WAs can be found in Section 7.7 of this procedure.
<b>Forms</b>	Forms are used in some procedures to provide a method for documentation. Training requirements for forms can be found in Section 7.8 of this procedure

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## 6. RESPONSIBILITIES

6.1. Functional Managers (FM) and Project Managers (PM) are responsible for:

- 6.1.1. Ensuring that the personnel selected for a position are qualified by reviewing a person's qualifications and selecting personnel based on their education and experience as it relates to the position.
- 6.1.2. Developing job descriptions for personnel working for or representing BGS that perform or manage quality affecting activities for Quality Level 2 (QL-2) or Quality Level 3 (QL-3) programs or projects.
- 6.1.3. As applicable, ensuring qualification and training requirements are flowed-down into procurement documents, per BGS-PC-01, *Procurement*.
- 6.1.4. Determining the initial and continuing training needed for their personnel to ensure the following items (as applicable to the functional area, program, or project) are communicated:
  - a) General criteria
  - b) Technical objectives
  - c) Requirements
  - d) Regulatory commitments
  - e) Procedures
  - f) Quality assurance requirements
- 6.1.5. Generating Training Needs Determinations (TND) for RR and submitting TNDs to the TM.
- 6.1.6. Developing the content for and conducting pre-job briefings for areas under their jurisdiction for which they possess the education, experience, and expertise necessary to competently brief others in the proper performance of the subject matter.
- 6.1.7. Submitting the pre-job briefing content and evidence of completion (i.e., attendance sheet) to the DCA per BGS-RM-01, *Quality Assurance Records*.
- 6.1.8. Submitting a copy of the pre-job briefing attendance sheets to the TM.

6.2. The Training Manager (TM) or designee is responsible for:

- 6.2.1. Receiving TND(s) for RR and submitting the TND to the DCA per BGS-RM-01, *Quality Assurance Records*.
- 6.2.2. Executing the TND by notifying the target audience.

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6.2.3. Ensuring that RR training evidence of completion is forwarded to the DCA per BGS-RM-01, *Quality Assurance Records*.

6.2.4. Tracking training completion.

6.2.5. Assessing the training program on a periodic basis to determine that training efforts are conducted according to this procedure per BGS-MG-03, *Management Assessments*.

6.2.6. Updating and revising this procedure.

### 6.3. Training Support Staff (TSS)

6.3.1. Carries out delegated duties as requested by the TM.

### 6.4. Target Audience personnel are responsible for:

6.4.1. Completing RR and/or applicable briefings prior to commencing work.

6.4.2. Submitting evidence of completion, as requested.

### 6.5. Document Control Administrator (DCA)

6.5.1. Ensuring submitted training records are electronically filed and is entered into the RMS per BGS-RM-01, *Quality Assurance Records*.

## 7. PROCEDURE

### 7.1. Qualification

7.1.1. The FM/PM is responsible for ensuring that the personnel selected for a position are qualified by reviewing a person's qualifications and selecting personnel based on their education and experience as it relates to the position.

7.1.2. For QL-2 and QL-3 positions only;

a) FM/PM shall develop a written job description for each position (see section 7.1.3).

b) FM/PM shall document the review and selection of the person by generating a qualification package (see sections 7.1.4 & 7.1.5)

7.1.3. Generating a Job Description (QL-2 and QL-3 only)

a) The FM/PM develops and documents a job description for a position(s) when the responsibilities of the position(s) includes performing or managing quality affecting activities for QL-2 or QL-3 programs or projects. (See Attachment 1, BGS-TRF-01.1, *Job Description*).

b) The FM/PM submits the job description to the DCA per BGS-RM-01, *Quality*

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*Assurance Records.*

7.1.4. Selection of Personnel for a QL-2 or QL-3 Job Description

- a) The FM/PM selects the person to fulfill the position listed in the job description by reviewing the person's education and experience as it relates to the position's job description.
- b) Once the FM/PM has made the selection of the person to fill the position, the FM generates a qualification package for that person.

7.1.5. Generating a Qualification Package

- a) A qualification package consists of:
  - Form BGS-TRF-01.2 *Qualification Verification* (see Attachment 2)
  - A copy of the applicable job description
  - A copy of the person's resume
- b) The FM/PM:
  - Completes form BGS-TRF-01.2, *Qualification Verification*
  - Attaches a copy of the job description to the form
  - Attaches a copy of the person's resume to the form
  - Submits the completed package to the DCA per BGS-RM-01, *Quality Assurance Records*.

7.2. Required Reading (RR) - Initial Training

7.2.1. The FM/PM identifies the RR needed by determining:

- a) **what** needs to be read
- b) **who** needs to read it

7.2.2. The FM/PM may also choose to identify;

- a) **why** they need to read it
- b) **when** they need to have the RR completed



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7.2.3. After the FM/PM has determined “who needs to read what”, the FM/PM communicates their Training Needs Determination (TND) to the Training Manager (TM). This communication can be via the form (BGS-TRF-01.4) or an email. The TND shall include:

**NOTE:**

If the number of documents to be read and number of people needing to complete the RR are considerable and/or varied (i.e., not everyone listed needs to read every document identified), then an attachment to the form or the email may be utilized (i.e., MS Excel spreadsheet, MS Word table, etc.).

- a) What needs to be read
  - The FM/PM identifies what needs to be read (i.e., policy, plan, procedure, etc). The FM/PM either attaches what they want read to the email or includes specific information (ID#, Rev.#, Title, etc.) to accurately identify the document so that the TM knows and can locate the document the FM/PM wants the target audience to read.
- b) Who needs to read it
  - The FM/PM identifies the names of the person(s) (i.e., the target audience) that the FM/PM wants to read the document(s).
- c) The FM/PM may elect to include “Why” the target audience needs to read the document(s) and if it is time sensitive, then the FM/PM may also indicate “When” the target audience needs to have the RR completed.

7.2.4. After receiving the RR TND from the FM/PM, the TM:

- a) Reviews the TND to ensure he/she understands the TND and can execute the TND.
  - If the TM needs additional information or clarification, then the TM notifies the FM/PM that additional information or clarification is needed.

**NOTE:**

1. It is recognized that BGS personnel may work on multiple projects under multiple PMs. If a target audience member has already completed the RR of the same revision of a document identified in a new TND request, then the TM does not need to request that person to read the document again.
2. Personnel who sign any document as an author, approver, etc. do not have to also submit RR evidence of completion. Their signature on the document will suffice as evidence that they have read the document.

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Depending on the additional information or clarification, the TM may request that the FM resubmit the TND with the updated information.

- b) Once the TM has enough information to execute the TND, then the TM;
- submits the TND to the DCA per BGS-RM-01, *Quality Assurance Records*
  - notifies the target audience of what document(s) need to be read by transmitting a RR request.
- c) The RR request (i.e., email) includes:
- What needs to be read (i.e., document's number, title, revision, etc. so that it will be clear to the target audience what they need to read)
  - The document(s) location (i.e., either as an attachment to the email, a hyperlink embedded in the email, or whether the document resides on employee portal, etc.).
  - Instructions for submitting evidence of completion. (i.e., "Once you complete the RR, please send me a confirmation email. Your email should state, I have completed RR of BGS-TR-01, R0, Training")
- d) The RR request may also include:
- The FM/PM responsible for the TND. (i.e., Per, John Doe's, you need to complete RR of *insert document title, number, revision, etc.*)
  - If applicable, the expected completion date

7.2.5. The target audience completes the RR and provides evidence of completion to the TM.

7.2.6. TM submits the RR evidence to the DCA per BGS-RM-01, *Quality Assurance Records*.

7.2.7. TM tracks RR completion [i.e., Training Tracking Matrix (TTM) or an equivalent method].

### 7.3. Updating the TND

7.3.1. If the FM/PM needs to update an existing TND, then they send a revised TND (per section 7.4.3). Upon receipt of the revised TND, the TM follows the steps identified in section 7.4.4.

### 7.4. Briefings - Initial Training

7.4.1. FM/PM identifies the briefings needed for the functional area, program or project.

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7.4.2. FM/PM's are authorized by the President to conduct briefings for areas under their jurisdiction for which they possess the education, experience, and expertise necessary to competently brief others in the proper performance of the subject matter.

- a) The FM/PM may delegate the development or delivery of the briefing to an SME of their choosing, but the FM retains the responsibility that the steps listed in this section are executed.

7.4.3. FM/PM identifies the target audience and the briefing(s) that is needed.

7.4.4. The FM/PM will:

- a) prepare briefing material(s).
  - For any questions or guidance on formatting a briefing contact the TM. At a minimum, the briefing material should have a BGS title page that contains the title of the briefing, who is conducting the briefing and the date that the briefing occurs (see Attachment 5 for an example).
- b) schedule briefing with target audience
- c) conduct the briefing
- d) initiate an Attendance Sheet (see Attachment 3, BGS-TRF-01.3) and obtain the target audience's confirmation of completion (see Section 7.6.5.)

7.4.5. Documenting Attendance

- a) Attendance for personnel is documented on an attendance sheet (see Attachment 3, BGS-TRF-01.3).
- b) Personnel in attendance on the date of the briefing will sign the attendance sheet.
- c) Attendance for personnel attending a briefing via a conference call is documented as follows:
  - In the "Name" column of the attendance sheet, the person conducting the briefing writes the name of the conference call attendee.
  - In the "Signature" column of the attendance sheet, the person conducting the briefing writes "via conference call" then initials and dates next to the entry.
  - The FM attaches the email to the attendance sheet and submits the attendance sheet and attachment to the DCA.
- d) For personnel unable to attend the briefing, the FM/PM or designee may 1)

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conduct another session and/or 2) the FM/PM or designee may record the briefing and provide a copy (i.e., via a hyperlink, etc.) of the briefing to the person(s) unable to attend.

- Attendance for onsite personnel who are attending a “make-up” session or viewing a recorded session of the briefing is documented by the FM/PM providing an attendance sheet for the person to sign.
- Attendance for offsite personnel viewing a recorded session of the briefing is documented by the person submitting an email to the FM/PM confirming they viewed the recorded session of the briefing. The email shall contain identifying information such as the title of the briefing, the date conducted, the person conducting the briefing and the date the briefing was viewed. (i.e., This is to confirm that on *insert date* I viewed the recorded session of *insert title of briefing*, initially conducted on *insert date* by *insert name of the person who conducted the briefing*.)

7.4.6. The FM/PM submits the attendance evidence and briefing materials to the DCA per BGS-RM-01, *Quality Assurance Records*.

7.4.7. The FM/PM forwards a copy of the attendance evidence to the TM.

7.4.8. The TM tracks completion of the briefing [i.e., Training Tracking Matrix (TTM) or an equivalent method].

#### 7.5. Work Aid (WA) Training

7.5.1. Training on work aids is confined to the FM/PM (or designee) reviewing the WA with the person performing the task until the FM (or designee) and the person verbally agree that the person understands and can successfully execute the WA without direct supervision.

#### 7.6. Form Training

7.6.1. Training on how to complete a form is confined to the FM/PM (or designee) reviewing the form with the person completing the form until the FM or designee and person verbally agree that the person understands and can successfully complete the form.

#### 7.7. Continuing Training

7.7.1. BGS personnel will receive continuing training as determined by the FM/PM or designee to ensure competence is maintained when changes in procedures, standards, technology, methods, or job responsibilities occur.

7.7.2. The determination of when continuing training is needed is determined based on the scope, complexity, importance of activity or the proficiency of the person needing to be trained.

a) Required Reading

- The FM/PM determines when continuing training for project personnel is appropriate using the guidelines in the Table 1.0 below. These guidelines ARE NOT all-inclusive or requirements, they are only provided to assist the FM in making the decision of when continuing training might be needed.

**Table 1.0**

Example	Continuing Training Needed?
Major Revision of a Procedure	Yes <sup>2</sup>
Minor Revision of a Procedure	See footnote <sup>3</sup>
Personnel Knowledge, Skill or Ability Issue?	Yes <sup>4</sup>

b) Briefing

- FM/PM identifies the when additional briefings are needed for the functional area, program or project using the guidelines in the Table 2.0 below. These guidelines ARE NOT all-inclusive or requirements, they are only provided to assist the FM in making the decision of when continuing training might be needed.

**Table 2.0**

Example	Change is complex or impacts the quality of the item or service?	Continuing Training Needed?
Change in program or project requirements, standards, methods, organization, responsibilities, or scope?	Yes	Yes
	No	See footnote <sup>5</sup>
Change in a process, specific task or method to accomplish the task?	Yes	Yes
	No	See footnote <sup>5</sup>
Personnel Knowledge, Skill or Ability Issue?	NA	See footnote <sup>5</sup>

7.7.3. When additional briefings are needed, the FM/PM follows Section 7.5.

## 8. RECORDS GENERATED

8.1. The following records are QA records and will be maintained per BGS-RM-01, *Quality Assurance Records*.

<sup>2</sup> By default, the TM will send out procedures that have had major revisions to all personnel previously identified as needing the procedure.

<sup>3</sup> Whether to conduct continuing training for a minor revision is at the discretion of the FM that owns the procedure. If the FM decides that RR is needed for a minor revision, then the FM generates a TND per Section 7.4.3.

<sup>4</sup> The FM will notify (per section 7.4.3), the TM when additional RR is needed for a person(s) that need to reread a document(s).

<sup>5</sup> Whether to conduct continuing training is at the discretion of the FM.

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- 8.1.1. Job Descriptions
- 8.1.2. Qualification Verification Packages
- 8.1.3. Training Needs Determinations
- 8.1.4. Evidence of Completion (i.e., attendance sheets or emails)
- 8.1.5. Content of Briefing Sessions
- 8.1.6. Content of Required Reading

## **9. ATTACHMENTS**

- 9.1. Attachment 1, BGS-TRF-01.1, Job Description
- 9.2. Attachment 2, BGS-TRF-01.2, Qualification Verification
- 9.3. Attachment 3, BGS-TRF-01.3, Attendance Sheet
- 9.4. Attachment 4, BGS-TRF-01.4, Training Needs Determination Form
- 9.5. Attachment 5, Title Page for a Briefing (EXAMPLE)

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**ATTACHMENT 1 - BGS-TRF-01.1, Job Description**

	<b>JOB DESCRIPTION</b>	<b>DATE:</b>
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***INSERT TITLE OF POSITION***

**Specific Responsibilities Include:**

- Revising and updating .....
- Implementing and monitoring ...
- Assisting the .....
- Assisting Human Resource Department with .....
- Assisting the Functional Managers (FM) with .....
- In coordination with ..... develop and implement (as necessary) a continuous training program.
- Assist in the continuous improvement ....
- Ensuring evidence is submitted to the Records Management System.
- Assisting with identifying .....
- Develop and maintain .....

EXAMPLE

**Required Education and Experience:**

- A .....degree in ..... or related discipline.
- Minimum of ..... years of experience in the development, implementation and deployment of .....
- Minimum of .....year of experience
- Familiarity with DOE and NQA-1 is a plus.
- Proficient in MS Office products.
- Demonstrated ability to work independently or under minimal supervision.

*The above is an example only. Job Descriptions shall include, at a minimum, the responsibilities of the position and the required education and/or experience.*

BGS-TRF-01.1, R0

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**ATTACHMENT 2 - BGS-TRF-01.2, Qualification Verification**



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Qualification Verification Form  
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**EXAMPLE**

Date:

To: Memo to (*insert appropriate program or project, if applicable*) Training File

Subject: Staff Qualifications and Experience for *insert title*

Per BGS-TR-01, *Training*, personnel are hired or selected for a position based on their education and experience as evidenced by their job application and/or resume.

The FM for personnel performing or managing quality affecting activities for QL-2 or QL-3 programs or projects is responsible for reviewing the person's qualifications against the job description and documenting the review on the Qualification Verification Form

This memo to file is to serve as evidence that the attached resume for *insert name* has been reviewed against the requirements listed in the job description (also attached) and accepted as evidence of qualification for the position of *insert title*.

Approval:

Printed Name: insert name                      Signature: \_\_\_\_\_                      Date: \_\_\_\_\_

Title: *insert position*

*After this Qualification Verification Form is approved, attach the job description, the person's resume and forward all three to the Document Control Administrator per BGS-RM-01, Quality Assurance Records.*

BGS-TRF-01.2, R0



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**ATTACHMENT 3 - BGS-TRF-01.3, Attendance Sheet**

Title of Briefing	<i>Insert title</i>
Date	<i>Insert date</i>
Subject Matter Expert	<i>Insert the name of the person conducting the briefing</i>

By signing below, I confirm attendance to the Briefing described above

#	Name (Typed or Printed)	Signature
1		
2		
3		
4		
5		
6		
7		

EXAMPLE

NOTE: See Section 7.4.5 of BGS-TR-01 on how to document attendance

The person conducting the briefing submits:

1. briefing completion evidence (i.e., attendance sheet or email) and briefing materials to the DCA.
2. a copy of the completion evidence (i.e., attendance sheet or email) to the Training Manager.

BGS-TRF-01.3, R0

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**ATTACHMENT 4 - BGS-TRF-01.4, Required Reading Training Needs Determination Form**

Subject Matter	<i>The FM/PM identifies what needs to be read (i.e., policy, plan, procedure, etc). The FM/PM either attaches what they want read to this form (or email) or includes specific information (ID#, Rev.#, Title, etc.) to accurately identify the document so that the TM knows and can locate the document the FM/PM wants the target audience to read.</i>
Target Audience	<i>Insert list of personnel who need to complete the RR – an attachment to the form (Excel spreadsheet or Word table) can be utilized.</i>
FM/PM (date and signature)	<i>Signature and date of FM/PM requesting the RR</i>

The above fields are mandatory. The FM may also include ‘why’ the RR is needed and a due date for completion.

Submit completed form (or email) and any attachments to the Training Manager

**NOTE: An email to the Training Manager is also sufficient as long as all the mandatory fields noted above are included.**


**EXAMPLE**

BGS-TRF-01.4, R0

<b>FUNCTIONAL AREA: Training</b>	<b>BGS-TR-01</b>	
<b>PROCEDURE TITLE: Qualification and Training</b>	<b>REV. NO. 0</b>	<b>DATE: 02/22/16</b>
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**ATTACHMENT 5 – Title Page for a Briefing**

The format for briefings may vary, however, at a minimum the briefing needs to have a title page indicating the title, the name of the person conducting the briefing, and the date the briefing was conducted.



# Overview of Changes to Procedure

## BGS-TR-01, R0

### Qualification and Training

(use to be BGS-QA-01)

**Insert date**

**Insert name**

**Insert title**

EXAMPLE

Overview of BGS-TR-01, R0
1
Rev. 0