DTS Changes for 2015
The Member Company Training Program Evaluation Form (TO Companies)
NERC Standard PER-005 R 1.4 specifies that the Training program required of an RC/BA or TOP must be evaluated at least annually for effectiveness.

- Identify any required changes
- Implement any changes identified

1.4. Each Reliability Coordinator, Balancing Authority, and Transmission Operator shall conduct an evaluation each calendar year of the training program established in Requirement R1 to identify any needed changes to the training program and shall implement the changes identified.
• PJM, as the TOP is the entity subject to the requirement
• However, as with other tasks, PJM considers this a “shared” task with our TO members
• Because TOs train on their own company specific tasks, their training programs must also meet the standards of PER-005
  • This includes an annual program evaluation

<table>
<thead>
<tr>
<th>Category</th>
<th>Standard Number</th>
<th>Requirement Number</th>
<th>Approved RTO/ERG Standards</th>
<th>E</th>
<th>Assigned or Shared TO Tasks</th>
<th>F</th>
<th>Shared PIM Tasks</th>
<th>G</th>
<th>Audit Question</th>
<th>H</th>
<th>Evidence of Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PER</td>
<td>PER-005-1</td>
<td>B.14</td>
<td></td>
<td>S</td>
<td>1. The Member TO shall participate in annual evaluations of the training program established in B.1 to identify any needed changes to the training program and shall implement the changes identified.</td>
<td></td>
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</tbody>
</table>

PJM©2014 11/14/2014
From the TO/TOP Matrix;

- PJM Audit Questions:
  1. Have you participated in the evaluation of the PJM Training program?
  2. Have you conducted an annual evaluation of your training program, established in R1 to identify any needed changes to the training program?
• From the TO/TOP Matrix;
  • Evidence of compliance (what the auditors will be looking for):
    • Show evidence of an annual evaluation of your training program established in R1, to identify any needed changes to the training program, and any changes that have been implemented
  • PJM has not previously given any guidance or suggestions as to what this evidence should look like
  • We have now created a standardized form for all TOs to complete so that this requirement can be met and documented
• The form will be accessed and completed within the “company” accounts for each TO that are already established within the LMS
  • The accounts currently used to perform the “monthly” reviews of the Transmission Owner and Generation Owner Task Lists
• PJM will monitor completion of the form and keep the records within the LMS
Member Company Training Program Evaluation Form

CS Trng Prog Eval

Please complete this questionnaire to confirm the status of your annual evaluation of your company's Training Program.

1. Our company training program was reviewed and, where appropriate and feasible, recommendations for changes were implemented. (Select only one)
   A  Yes, our program was reviewed
   B  No, we did not complete this review

2. Please provide any comments related to this program review:
3. We have retained copies of training materials. (Select only one)
   
   A  Yes
   B  No

4. Link to internal file location where source documents are located. (optional)

5. Training Materials used have clearly established links to Learning Activity Objectives and Tasks. (Select only one)
   
   A  Yes
   B  No

6. We have conducted an annual review of our company-specific Task List. (Select only one)
   
   A  Yes
   B  No

7. Please provide any comments regarding your Task List Review:
Member Company Training Program Evaluation Form

• Accessing the forms will be done through the PJM LMS.
  • First log into your company (not personal) LMS account, just as you currently do to access the Task List reviews
  • Choose the “My Plan” option to see the Evaluation
Once you have selected the evaluation form, a window will pop up giving you a “course description” of the form
Member Company Training Program Evaluation Form

- Once you have clocked “Start Course”, the LMS will make available the “lesson” for your program review
- Click “fill out” to complete the Program Evaluation

<table>
<thead>
<tr>
<th>Lesson Name</th>
<th>Lesson Type</th>
<th>Required</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Review</td>
<td>Evaluation</td>
<td>✔️</td>
<td>Not Started</td>
<td>Fill out *</td>
</tr>
</tbody>
</table>

* Opens in a new window. Please disable pop-up blockers to open.
## Member Company Training Program Evaluation Form

### Company Evaluation

1. Our company training program was reviewed and, where appropriate and feasible, recommendations for changes were implemented.
   - A. Yes, our program was reviewed
   - B. No, we did not complete this review

2. Please provide any comments related to this program review:

3. We have retained copies of training materials.
   - A. Yes
   - B. No

4. Link to internal file location where source documents are located (optional):

5. Training materials used have clearly established links to Learning Activity Objectives and Tasks.
   - A. Yes
   - B. No

Question 1-5 of 6 total questions
PJM Training Program Evaluation Form
(Coming in 2015)
Member Company Training Program Evaluation Form

- From the TO/TOP Matrix;
  - PJM Audit Questions:
    1. Have you participated in the evaluation of the PJM Training program?
    2. Have you conducted an annual evaluation of your training program, established in R1 to identify any needed changes to the training program.
Member Company Training Program Evaluation Form

- From the TO/TOP Matrix;
  - Evidence of compliance (what the auditors will be looking for):
    - Show evidence of participation in the PJM training program evaluation, such as emails or minutes of meetings
  - PJM has previously considered attendance at Curriculum Review meetings as evidence of compliance
    - This meant entities had to attend meetings that were only held 3 times a year
  - We will be creating a second standardized form for all TOs to complete so that this requirement can be met and documented
• PJM internally tracks all changes made internally based on reviews from course attendees
  • The transition from using flash drives with course materials to loading them into the individual’s LMS account
  • Extending the length of the FOTO and GOF programs
• The new form (not yet formalized) will be the members’ opportunity to provide more formalized and documented feedback on how our training programs can be improved
As with the Member Company Training Program Evaluation Form, this document will be accessed and completed within the “company” accounts for each TO that are already established within the LMS.

- PJM will monitor completion of the form and keep the records within the LMS.
- Form is currently under development but will be posted in the LMS “company” accounts in January 2015.
PJM Training Program Evaluation Form

PJM LMS Course Evaluation

TRAIN CODE: ____________________ COURSE TITLE: ____________________
Date taken: __________ to __________ Your name (optional): ______________

1. Does the PJM Initial Training Program provided to your operators meet your company’s expectations? (Select only one)
   □ Yes
   □ No
   □ No one from my company attended initial training this year
   2. Please explain:

3. Does the PJM Evaluating Training Program provided to your operators meet your company’s expectations? (Select only one)
   □ Yes
   □ No
   □ No one from my company attended continuing training this year
   4. Please explain:

5. Does the PJM course evaluation that was provided meet your company’s expectations? (Select only one)
   □ Yes
   □ No
   □ No one from my company attended training this year
   5. Please explain:
• Additional review materials will be added to the LMS to assist in this review.
  • PJM DIF analysis for both Task Lists
  • Lists of which PJM training modules comprise each initial training program
  • Task-to-Training linkages for the initial transmission training content
  • Task-to-Training linkages for the initial generation training content
  • Task-to-Training linkages for the Power System Fundamentals Course
  • Task-to-Training linkages for the Basic Electrical Theory Course
Resources and References