Applicability

This procedure is a guide to be used by the Office of Human Resources when determined that a particular class requires that an instructor be qualified.

Introduction

This procedure establishes the standards and acceptable methods of qualifying instructors through the Office of Human Resources when requested to do so by a department head.

Reference Documents

PPPL Procedure TR-001   Laboratory Training Program

Definitions

Instructor - an individual with experience, training, or education in Systematic Approach to Training (SAT) Methods and presentation techniques. These individuals are capable of developing training courses and materials, approving training courses and materials developed by other instructors, presenting classroom and On-the-Job instruction, evaluating trainees, and evaluating training programs.

Subject Matter Expert (SME) Instructor - an individual with prerequisite background or experience necessary for instructional competency in a specific subject, task, or field of knowledge. Such an individual is qualified by education, training, or experience, and is a recognized expert on a particular subject, task, or system. These individuals are capable of developing training courses and materials, presenting classroom and On-the-Job instruction, and evaluating trainees, within their subject area.

On-the-Job Training (OJT) Instructor - an individual (other than a supervisor) with prerequisite background or experience necessary for instructional competency to train and evaluate the performance of others in the workplace on specific procedures, equipment, or tasks. These individuals are capable of presenting OJT instruction and evaluating trainees, within their subject area.

Requalification - determined by the Department Head and the Office of Human Resources. Requalifications will be based largely on whether or not a formal exam is given which has been validated by Human Resources and the Subject Matter Expert.

Procedure

A.   Qualification Requests, Review, and Approval

Responsibility	**Action**

Department/Division Heads   1.   Recommend new instructors or instructors for new courses to benefit their departments/divisions.

2.   At the request of the Training Specialist, provide a Management Statement of Technical or Task Competency for a given subject, task, or system. (Systems may be defined by procedure number and title for instruction in those procedures.)

Training Specialist or Designee

3.   Establishes the appropriate instructor level for the individual.

4.   Works with candidate until course materials and qualification files are complete.

5.   Prepares a qualification file which contains, as appropriate:

    a.   evidence which verifies the individual's technical knowledge and experience, such as any of the following:

       1)   a resume that addresses subject matter and/or instructional competency

       2)   specialized training records

       3)   Management Statement of Technical or Task Competence (Attachment 1).

    b.   an observation or evaluation of the individual's instructional ability documented on Attachment 2 "Instructor Observation Checklist".

6.   Reviews the file for completeness and approves the individual's Instructor Statement of Qualification (Attachment 3).

7.   Forwards completed file for retention in the Human Resources and Training Files.

B.   **Determination of Training Requirements for Instructors**

<u>Responsibility</u>   <u>Action</u>

Training Specialist or   1. Reviews instructor education, experience, prior training, and
Designee   capability.

                                2. Determines the need for instructor training, if any, based upon
                                    consideration of the following applicable elements:

                                    a. recommendations made during instructor observations

                                    b. expressed interest of instructor

                                    c. projected instructor needs.

                                3. Recommends appropriate training topics or programs to assist
                                    instructor development. See Attachment 4 for list of typical
                                    training topics:

C.   **Continuing Training for Instructors Where Necessary**

<u>Responsibility</u>   <u>Action</u>

Training Specialist or   1. Reviews Instructor performance periodically.
designee

                                2. Recommends continuing training for individuals, if any, based
                                    upon consideration of the following applicable elements:

                                    a   recommendations made during instructor observations

                                    b. expressed interest of instructor

                                    c. projected instructor needs.

                                3. Recommends appropriate training topics or programs to assist
                                    instructor development. See Attachment 4 for a list of typical
                                    training topics:

D.   Providing Instructor Training

<u>Responsibility</u>   <u>Action</u>

Training Specialist or   1.   Locates courses or develops training that satisfies training
designee   recommendations.

                                2.   Develops in-house training programs, as appropriate.

                                3.   Reviews vendor courses for applicability, and forwards
                                     applicable course information to the Department Head,
                                     Human Resources for review or approval.

                                4.   Provides alternative options to in-house or vendor courses, as
                                     needed. These may include:

                                     a.   Academic courses, reading lists, professional conferences
                                          or other opportunities to observe industry implementation.

                                     b.   Presentation-skills seminars, self-development video
                                          critiques, technical area course work, or opportunities to
                                          observe industry implementation.

E.   Attachments
                                1. Management Statement of Technical or Task Competence
                                2. Instructor Observation Checklist
                                3. Instructor Statement of Qualification
                                4. Typical Training Topics

Attachment 1
Management Statement of Technical or Task Competence

TO: **TRAINING SPECIALIST**

FROM: _____

SUBJECT: **ASSESSMENT OF TECHNICAL COMPETENCY**

This is to verify that _____ is competent in the following areas.
                              (Name of Candidate)

Check the correct box below.

☐ Subject Matter Expert Instructors   See the areas below. The candidate has the
                                            knowledge, skill, and experience to instruct in
                                            these and related subject areas.

☐ OJT Instructor   See the list of procedures, tasks, or systems
(Task or procedure specific)   below. The candidate has been trained and
                                            evaluated in the procedures associated with
                                            these activities at PPPL.

List Areas of Technical Competence:	Approximate years of experience in each area:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Signed:_____   Date:_____

Attachment 2
Instructor Observation Checklist

Course title/code/_____Candidate/Instructor_____

Observation date:_____Length of Observation _____hr.

Observer / Title_____Signature_____

Directions: Check *Yes, No, Not Applicable,* or *Not Observed*

I.   Advance Preparation

The instructor was prepared for the training session.	YES	NO	NA	NOT OBS
Training materials previewed.	( )	( )	( )	( )
Attendance sheets, administrative material on hand.	( )	( )	( )	( )
Training aids and materials (i.e. tests, handouts, overheads) were organized for effective and efficient use.	( )	( )	( )	( )

II.   Format of the Training Material (Classroom)

The instructor demonstrated ability to follow the lesson plan.	YES	NO	NA	NOT OBS
An overview of the session was presented as part of the introduction. Training objectives were provided at the beginning of the class.	( )	( )	( )	( )
Training content was presented according to the lesson plan.	( )	( )	( )	( )
Instructor/Trainee activities were implemented according to the plan.	( )	( )	( )	( )
The instructor demonstrated ability to make instruction meaningful for trainees.	( )	( )	( )	( )
Objectives were reinforced during the training.	( )	( )	( )	( )
Examples or analogies were used to relate content to practical situations.	( )	( )	( )	( )

III.   Logical Presentation

| **The instructor demonstrated the ability to present the content and instructor/trainee activities in an organized, logical sequence.**	YES	NO	NA	NOT OBS
Each point and/or objective flowed to the next.	( )	( )	( )	( )
Trainees could follow the presentation without confusion.	( )	( )	( )	( )
Meaningful relationships between concepts and skills were clear.	( )	( )	( )	( )
Topics had natural beginning and ending points.	( )	( )	( )	( )

IV   **Applied Instructional Theory**

The instructor demonstrated the ability to involve trainees actively in the learning process (as opposed to constant lecture or watching a demonstration.)	**YES**	**NO**	**NA**	**NOT OBS**
Active trainee participation was encouraged.	( )	( )	( )	( )
Checks for understanding were made through questioning, performance review etc.	( )	( )	( )	( )
Training was adjusted according to trainee needs.	( )	( )	( )	( )
Behavior and trainee responses were reinforced in a positive manner.	( )	( )	( )	( )
Frequent and appropriate trainee responses were elicited.	( )	( )	( )	( )
Asking subject-matter questions was encouraged.	( )	( )	( )	( )
Trainees were given an opportunity to practice more than once (if needed.).	( )	( )	( )	( )
Hands-on practice was provided, where possible.	( )	( )	( )	( )
The instructor summarized key points/information/task steps before progressing to the next objective.	**YES**	**NO**	**NA**	**NOT OBS**
The amount of information presented was appropriate for the trainees	( )	( )	( )	( )

V.   **Presentation Skills**

The instructor demonstrated good presentation skills.	**YES**	**NO**	**NA**	**NOT OBS**
The instructor spoke clearly, and audibly.	( )	( )	( )	( )
The instructor used overhead/audio-visual equipment well. (Minimum fumbling with materials, not blocking screen with body, etc.)	( )	( )	( )	( )
Instructor demonstrated awareness of trainees through out presentations by his/her actions. (Did not persistently teach with back turned to read screen. Did maintain eye contact repeatedly during class, etc.)	( )	( )	( )	( )
Instructor demonstrated respect for trainees in word and manner. (Answered questions with professional courtesy. Maintained order during presentation without disrespect for interruption. Etc.)	( )	( )	( )	( )
The instructor demonstrated enthusiasm for subject, but did not over indulge in personal anecdote. (Anecdotes effective, and directly related to illustrating course material or establishing credibility in first few minutes of course)	( )	( )	( )	( )
Instructor avoided habitual distractions in presentation or speech.	( )	( )	( )	( )

Attachment 3

PPPL	PRINCETON PLASMA PHYSICS LABORATORY
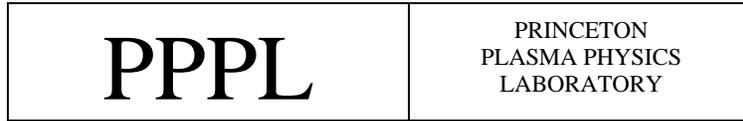
Human Resources
Statement of Qualification

_____

Name of Candidate

Is qualified in accordance with TR-005
of the PPPL Procedure Manual to perform the duties of a

☐ INSTRUCTOR

☐ SUBJECT MATTER EXPERT (SME) INSTRUCTOR

☐ ON-THE-JOB TRAINING INSTRUCTOR

Recommendations for continuing
development:

☐ No Recommendations
☐ Basic Instructor Training
☐ Train the Trainer Course

Comments: (if any) _____

_____

_____

Qualified By: _____ DATE: _____

Training Specialist or Designee   Qualification Date

Attachment 4
Typical Training Topics

Basic Instructor Training (Introductory Level Topics for Classroom Instructors)	**Train the Trainer** (Advanced Level Topics for Classroom Instructors)	**OJT Instructor Training**
Role of the Instructor	Principles of Adult Learning and Motivation	General Information
Principles of Instruction	Classroom Instruction Methods	Training Portion
Assessing trainee entry level	Role of Classroom Instructor	Evaluation Portion
Classroom methods	Learning Objectives and Lesson Plans	Records Management
Presenting instruction	Instructional Materials & Media	Role of OJT Instructor
Using lesson plans	Training Program Evaluation	Learning Objectives
Using instructional materials and media	Written Exams and Test Items	Principles of Adult Learning and Motivation
Arranging classrooms	Trainee Stress and Stress Management	OJT Guides
Records Management	Qualification of Trainees	Qualification of Trainees

Attachment 4
Typical Training Topics

Continuing Training Topics for Instructors	
Refresher Topics from Basic Instructor Training	Topics from Basic Instructor Training and Train the Trainer
New and Advanced Instructor Techniques & Methods	Course Development Topics
Changes to Regulations and Standards	Advanced Media and Instructional Materials
Organizational Changes	Learning Styles and Lesson Plan Development
Performance Deficiencies	Technical Topics from Subject Area (e.g. safety training, etc.)
Industry Trends	Topics from Continuing Training for Instructors