

Guidelines for Developing Training Matrices	Effective Date: Sept. 30, 2013	Initiated by: Human Resources Director
	Supersedes: TR-007, Rev 2 Dated July 23, 2010	Approved: Director

Management System (Primary): 05.00 Human Resources Management
Management System Owner: Human Resources Director
Management Process: 05.03 Training
Process Owner: Human Resources Director
Sub-Process: 05.03.03 Training Qualifications Program
Sub-Process Owner: Training Specialist
Subject Matter Expert (SME): Training Specialist; Human Resources Director

Applicability

This procedure applies to PPPL Offices, Departments, Divisions and Projects for use in the development of training requirements.

Introduction

This procedure describes the methods for establishing individual training requirements based on Laboratory commitments to Environment, Safety and Health.

Definitions

Training matrices are approved, uncontrolled documents (they are assigned neither a document number nor revision level). The development of training matrices is recommended for all Laboratory work groups. Development of training matrices is done on a “need to have” basis. Training matrices are designed to detail training that is required and training that is recommended for a specific position. Training Matrices are created and maintained on-line to facilitate reviewing, update revisions and approvals.

Per the policy on *Staff Training and Development* “...in a case where a staff member from a Department is assigned (“matrixed”) to a Project, the Project’s management is responsible for including that individual in the Project organization and ensuring that any additional project-specific training requirements are established and fulfilled”. Projects should document their training requirements on a matrix.

For positions where a qualification or certification procedure is required, the qualification or certification procedure is a higher-level document than the training matrix, and shall take precedence over the matrix. The training requirements detailed in qualification or certification procedures shall be followed in lieu of those identified on the training matrix. The original approved training matrices will reside in the Office of Human Resources.

Reference Documents

P-008 Staff Training and Development
 TR-001 Laboratory Training Program
 TR-006 Establishing Qualification and Certification Requirements

Procedure

<u>Responsibility</u>	<u>Action</u>
Department, Division, Project Head or Supervisor	1. Initially identifies primary training and qualification needs of positions, based upon: <ul style="list-style-type: none"> a. job requirements b. environment, safety, and health requirements.
	2. Details specific training requirements and recommended (optional) training for each of the following areas, as appropriate: <ul style="list-style-type: none"> a. site access and radiological requirements b. safety training (ES&H courses) c. technical training d. practical training (OJT).
Training Specialist and Department, Division/Project Head or designee	3. Discusses initial training requirements and recommended (optional) training for each applicable position including principal procedures within the job, additional or ancillary responsibilities assigned to position.
Department, Division or Project Head or designee	4. Documents training requirements and recommendations on a training matrix for the positions identified. This includes listing positions and training by course name for subject areas.
	5. Completes the matrix with the appropriate symbols for required training and for recommended (optional) training, as identified.
Training Specialist or designee	6. Validates training requirements established by the Department/Project/Division and incorporates Laboratory mandatory courses, such as General Employee Training (GET) and reviews the matrix for accuracy.
	7. Coordinates review and approval, of training matrices by Department/ Project or Division Head or designee.
	8. Enters training information into the appropriate database

Training

Human Resources Director or Designee	<p>1. Provides the following training to this procedure:</p> <p>Target Audience: <u>Council Members and Supervisors</u></p> <p>Training Method: <input checked="" type="checkbox"/> Read only <input type="checkbox"/> Email distribution only to Supervisors <input checked="" type="checkbox"/> Notification to Council at Laboratory Management Meeting</p> <p>Frequency: <input checked="" type="checkbox"/> Once only after any significant revision of this procedure</p>
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F. Records Requirements

The Human Resources Department is responsible for maintaining the current training matrices once they have been approved by the effected line organization and submitted to Human Resources.

Record	Record Custodian	Location	Retention Time
Current Training Matrices	Human Resources Records Coordinator	Human Resources Department designated file location	Temporary record. Cut off the file at the time of separation. Destroy 2 years after position is abolished. If matrix is part of a hazardous job classification, transfer records to the local Federal records center and destroy 75 years after cutoff. <i>A1(7.1) of GEN-023.</i>

	Cyber Security	GET	Hazard Awareness	Sexual Harassment/ Sex Discrimination Awareness	Ladder Safety	Laser Safety	Radiation Safety	Lockout/ Tagout	Basic Electrical Safety
<i>Frequency</i>	A	***	*	*	*	**	**	***	***
Positions									
Mechanical Engineer	R	R	R	R	R	X	X	X	X
Engineering Technician	R	R	R	R	R	R	R	R	R
Diagnostic Technician	R	R	R	R	X	X	R	R	R
Research Staff	R	R	R	R	X	X	R	X	R
Administrative Assistant	R	R	R	R	X	X	X	X	X
Supervisor	R	R	R	R	R	R	R	R	R
Division Head	R	R	R	R	X	X	X	X	X
Department Head	R	R	R	R	X	X	X	R	R

This matrix is not to be used for Certification and Qualification requirements.

Approved by:

_____ (Date)
*Management Approval

Reviewed by:

_____ (Date)
Training Specialist

Frequency Legend:

- * One time only
- A Annual
- ** Every 2 years
- *** Every 3 years
- AN As Needed

Training Level:

- R** Training required for position
- S** Suggested training for position
- O** Optional Training for position
- X** Not Applicable

*Management Approval = Department, Division, Project Head or Their Designee.