



**Pacific Gas and
Electric Company**

LETTER AGREEMENT NO. R1-14-29-PGE

IBEW



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June 6, 2014

Mr. Tom Dalzell, Business Manager
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Vacaville, CA 95696

Dear Mr. Dalzell:

In 2013, the Company and Union agreed to establish a joint committee to review and update the Apprentice System Operator Administrative Procedures Manual specifically for apprentices in Electric Transmission. Also in 2013, a separate joint committee was established to review and update the training program as it applies to Apprentice System Operators in Electric Distribution.

On April 14, 2014, the Joint Apprenticeship and Training Committee (JATC) reviewed the revised manual presented for Transmission, approved its contents and recommended formal approval. The Company proposes that this manual be adopted as the specifications for the Transmission Apprentice System Operator training program. The Administrative Procedures Manual agreed to in Letter of Agreement 06-27 will continue to apply to Apprentice System Operators in Electric Distribution, until such time as that committee completes its work, submits it for JATC review and the parties agree to adopt it.

The twelve most recently hired incumbent apprentices in Transmission will immediately be rolled into the new training program. The one other incumbent apprentice in Transmission will continue in the old training program through completion.

This proposal has been discussed with Bob Dean, Senior Assistant Business Manager.

If you agree, please so indicate in the space provided below and return one executed copy of this letter to the Company.

Very truly yours,

PACIFIC GAS & ELECTRIC COMPANY

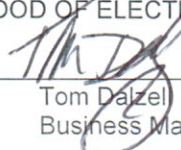
By: _____


Stephen A. Rayburn
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The Union is in agreement.

LOCAL UNION NO. 1245, INTERNATIONAL
BROTHERHOOD OF ELECTRICAL WORKERS, AFL-CIO

By: _____


Tom Dalzell
Business Manager

June 18

_____, 2014

Apprentice Transmission System Operator

ADMINISTRATIVE PROCEDURES MANUAL

March 14, 2014

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Electric Operations – Transmission System Operations – Vacaville Grid Control Center (GCC)

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DOCUMENT DESCRIPTION Document Title

Electric Operations – Transmission System Operations – Vacaville Grid Control Center (GCC).

This document outlines the administrative procedures in support of both implementation and sustainment of the Apprentice Transmission System Operator Program.

KEYWORDS

Apprentice, Apprentice Transmission System Operator, Journeyman Transmission System Operator, Transmission System Operator, System Operator, Operator, OIT, Operator in Training

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TBD

SVP Geisha Williams

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Apprentice TSO Administration Procedures Manual

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Apprentice TSO Administration Procedures Manual

INTRODUCTION

PURPOSE

The purpose of this Manual is to provide the requirements for participation and completion of the Apprentice Transmission System Operator (ATSO) Program. This manual and all requirements shall be in compliance and support the Letter of Agreement (LOA).

ABBREVIATIONS

Acronym	Terminology
AP	Action Plan
AS	Associates of Science Degree (2 year college equivalent)
APRC	Apprentice Program Review Committee
ATSO	Apprentice Transmission System Operator
CCR	California Code of Regulations
CE	Continuing Education
CEH	Continuing Education Hours
CEU	Continuing Education Units
FET	Field Experience Training
JATC	Joint Apprentice Training Committee
JTA	Job Task Analysis
LOB	Line of Business
LOA	Letter of Agreement
LR	Labor Relations
LRC	Local Review Committee
LSO	Lead System Operator
MAA	Master Apprentice Agreement
NERC	North America Electric Reliability Corporation
OJE	On-the-Job Experience
OJT	On-the-Job Training
PG&E	Pacific Gas and Electric
PSOS	Power System Operations School
SAT	Systematic Approach to Training
SME	Subject Matter Expert
SPT	Step Progression Test
TSO	Transmission System Operations/Transmission System Operator
WP	Wage Progression

TERMS AND DEFINITIONS

Term	Definition
Action Plan	A document prepared by the Apprentice Coordinator, in review with the Apprentice, which identifies specific requirements to make up any identified deficiencies during the Program.
Apprentice	Individual meeting eligibility requirements and entered into ATSO to become Journeyman TSO
Apprentice Coordinator	Training Department's designated person responsible for the overall program
Assessment	Testing or evaluation under required criteria for ATSO
Assessment Tests	Key Exams given at the end of a course/session which are critical components in understanding/comprehension. Strength/weaknesses identify areas for success or improvement prior to the SPT. These assessments are used as pass/fail points within a Step.
Asynchronous Learning	Training that occurs in a course environment which does not require direct contact or interaction with an instructor
Demonstrated Proficiency	Ability of Apprentice to fully understand and exhibit competence in an assigned area
Direct Supervision	Situation where a qualified individual can take immediate control from Apprentice
E-Learning	All learning activities where electronic media is used for purposes of training. This includes Computer Based Training (CBT) and Web-Based Training.
Evaluator	Qualified Individual providing evaluation of Apprentice
Facilitator	Individual qualified that oversees and guides the Apprentice in learning
Field Experience Training	A form of OJE training which includes any guided opportunity to be outside of the control center or in the field under the Direct or Indirect Supervision from appropriate personnel.
Indirect Supervision	Situation where Apprentice has been properly trained and demonstrated proficiency to perform task. Qualified individual may not be able to take immediate control from Apprentice
Instructional Activities	Classroom and E-Learning courses required for ATSO
Job Task Analysis (JTA)	A systematic approach to training which identifies all tasks associated with a specific job, position or duty. Training objectives are met by teaching to the specific skills and knowledge required to align with (or complete) the specific job task.
Instructor	Qualified Individual providing direct training to Apprentice
Journeyman Transmission System Operator	Fully capable and trained individual successfully completing ATSO.
Lab Work	A form of OJE learning where scheduled training using a variety of system simulation tools, software, or scenarios designed to emulate expected events related to required position tasks and assignments.
Mentor	Journeyman TSO and LSO that provides guidance and direction to Apprentice
NERC Certification	Certification by NERC in appropriate area of responsibility.
One-the-Job Experience (OJE)	All other opportunities for learning other than the classroom environment. They include FET, Simulation, OJT, and Lab Work. All of these elements comprise the OJE and are required in the ATSO program
One-the-Job Training (OJT)	The specific OJE which applies learning to actual time in the control room with a Journeymen or other qualified individual
Simulation	A form of OJE training which uses a variety of system simulation tools, software, or scenarios designed to emulate expected events related to required position tasks and assignments.
Step Progression Test (SPT)	These exams/assessments are required for advancement in ATSO. At the completion of Step 1,2,3 the Apprentice must successfully complete a SPT to advance in the Program. In Step 4, there is no SPT required for final advancement, but all required Area specific shift taking and seasoning must be completed.
Step Requirements Checklist	Check list which identifies ALL activities, courses, lab, simulation, homework etc that are required for completion of a Step
Subject Matter Expert	Qualified Individual considered as an expert in a specific area.
Synchronous Learning	Face-to-face contact and interaction with an instructor. It can be in a physical classroom or a webinar where the instructor is present real-time.
Task	Specific required functions outlined in job requirements for Journeyman Transmission System Operator
Wage Progression (WP)	Wage Progression -- The successful completion of SPT or required criteria to move to the next wage step in accordance with all necessary Agreements

ADMINISTRATIVE PROCEDURES

Introduction

Occupying an Apprentice position involves a number of required steps. Each action must be completed in turn so that the process continues in an orderly fashion, and all contractual obligations are fulfilled. The ATSO Program is broken into four (4) separate Steps as described below:

- Step 1/ Beginning: In Step 1 the Apprentice shall understand the concepts and requirements of the position tasks and assignments. In order to complete Step 1 the Apprentice must successfully complete all Step 1 requirements including the Step Progression Test (STP) #1.
- Step 2/ Intermediate: In Step 2 the Apprentice shall apply the concepts and requirements of the position tasks and assignments. In order to complete Step 2 the Apprentice must successfully complete the Step 2 requirements including the Step Progression Test (STP) #2.
- Step 3/ Advanced: In Step 3 the Apprentice shall be able to demonstrate full capabilities in the position tasks and assignments. In order to complete Step 3 the Apprentice must successfully complete the Step 3 requirements including the Step Progression Test (STP) #3.
- Step 4/ Seasoning: In Step 4 the Apprentice shall demonstrate competence in all job tasks and assignments including Area specific requirements and position seasoning. There is no Step Progression Test (SPT) for Step 4, but the Apprentice must complete all requirements.

Each Step of the ATSO Program will include:

- Instructional Activities – These are either classroom or E-learning as described herein.
- On-the-Job Experiences (OJE's) – These are events that enhance and reinforce the Instructional Activities. They include Field Experience Training (FET), Simulation, On the Job Training (OJT) and Lab work.
- Assessments – This includes any necessary testing, application and performance against required core standards, responsibilities and tasks.
- Documentation, Review and Evaluation by a variety of individuals and roles.

ORIENTATION

At the beginning of the Apprentice Transmission System Operator (ATSO) Program the Apprentice will be provided with an orientation to the requirements that must be completed. It will encompass all Program and Agreement requirements, and cover curriculum and schedule details.

APPRENTICESHIP AGREEMENT

Upon entering the Apprenticeship, the Apprentice Coordinator, Instructor, or Facilitator will assist the new Apprentice in completing the State Apprenticeship Agreement. The Apprentice Coordinator will provide a copy of the signed Agreement to the Apprentice and will then forward the agreement to Labor Relations (LR) two weeks before the official transition date for their action. Labor Relations will forward all completed Apprenticeship Agreements to the State of California Apprenticeship Board. When the form has been returned by the State, LR will forward the completed Apprenticeship agreement to the Apprentice's personnel file.

MASTER APPRENTICESHIP AGREEMENT

Unless modified by this ATSO Administrative Manual, the contents of the Master Apprenticeship Agreement (MAA) take precedence over all other agreements and understandings. As in all other items in this Manual, the contract and the MAA are the final source of authority for resolving conflicts and ambiguities.

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EDUCATIONAL BENEFITS

Completion of the ATSO Program provides specific career benefits to the Apprentice and to PG&E. These include:

- **Veterans Benefits:** Successful progress through the Apprenticeship Program may entitle certain Veterans to benefit from the Veterans Administration. Apprentices who believe they may be eligible are encouraged to consult with a Veteran's Benefits Counselor.
- **State Certification:** Completion of the ATSO Program is recognized by the State of California. Successfully completing the Program recognizes the Apprentice to Journeyman progression.
- **College credits and Continuing Education:** During the Apprenticeship, a variety of courses may have continuing education units (CEU's) associated with a course. These CEU's may afford the Apprentice the opportunity to apply CEU's towards a Degree in higher education through an Accredited Institution. While the Apprenticeship supports and endorses continued education, a Degree is separate from this Program and is voluntary.
- **Should the North American Electric Reliability Corporation (NERC) certification become required,** the Apprenticeship Program will adopt training that meets NERC requirements and adds an additional three (3) months to Step 3 as an addendum to this ATSO Program to specifically study for the NERC Certification Exam. Program details to be determined by a joint committee (recommended by the LRC) and approved by JATC.

RESOURCES

Resources are critical to the ATSO Program to help the Apprentice develop the skills and knowledge necessary to complete all Steps of the Program successfully. Resources include people and tools that provide the foundation for success in the ATSO Program.

People

There are many different contact points throughout the Program that will help develop the skills and knowledge for the ATSO Program.

- **Primary Contact:** The Apprentice Coordinator and those acting on behalf of the Apprentice Coordinator will be the primary contact for all ATSO's.
- **Secondary Contacts:** These include all areas and roles where the Apprentice may have direct or indirect interaction relative to each area of learning.

Tools

Tools available to the Apprentice include information, systems, equipment, and any necessary ancillary needs for successful completion of the Program.

PROGRAM RESULTS

The ATSO Program has been developed to help each Apprentice achieve success through the Program toward becoming a Journeyman Transmission System Operator. The results of participation in the Program are evaluated to ensure the safety and reliability of the bulk electric system. The Program provides for two outcomes:

- **Successful Completion:** At the completion of the ATSO Program, the Apprentice Coordinator will notify the TSO Managers, Supervisor, and Labor Relations that the training has been successfully completed. Labor Relations will notify the State of California that the training has been successfully completed. The State will return the Certificate of Completion of Apprenticeship to PG&E, and the certificate will be forwarded for presentation to the new Journeyman Transmission System Operator.
- **Unsuccessful Results:** ATSO participants who do not successfully complete the Program as described herein will be removed in accordance with this Agreement as indicated detailed herein.

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LINE OF PROGRESSION

The Line of Progression (LOP) for an Operator's career path is as follows:

Lines of Progression Table

Job Category	Duration
Assistant System Operator	Minimum 6 Months
Apprentice Transmission System Operator (ATSO)	24 Months
Unassigned/Journeyman / Relief Operator	N/A
Lead System Operator	N/A

GENERAL INFORMATION

The ATSO Program provides a framework for building the skills and knowledge necessary to provide safety and reliability of the bulk electric system, and progression to the level of Journeyman Transmission System Operator. The ATSO Program is specifically designed to give each participant the necessary classroom, independent learning, and actual hands on experience to fully demonstrate proficiency for all tasks required of the position.

REQUIREMENTS

PG&E expects each Apprentice to accomplish the duties assigned in a manner that is consistent with the company's safety, performance, and reliability standards. This includes successfully completing all steps of the Program.

ELIGIBILITY

All candidates to be considered for the ATSO Program must meet the following minimum requirements:

- Passing the Physical Pre-employment Test (PTB)
- Passing Operator Test Battery (OTB)
- Passing Industrial Skills Test (IST)
- Passing the COBRA Test (as applicable)
- Passing the Physical Medical Screen
- Possessing a current California Class "C" Driver's License.
- Possessing a High School Diploma or General Education Diploma (GED).

APPRENTICESHIP DURATION

The ATSO Program approximate duration is shown in the Lines of Progression Table herein.

WORKING CONDITIONS

Supervision *California Code of Regulations (CCR), Title 8, §210, "Working Conditions":*

Requirements: Apprentices shall work under and with competent journeymen and/or instructors and shall be assigned to work and learning tasks so that they obtain the diversified training on-the-job provided for in the apprenticeship standards."

The spirit of the language above is to ensure that apprentices are not performing work without oversight and that they are getting the necessary supervision and training to learn the proper work procedures and perform the work safely.

An apprentice may be assigned to work without direct supervision as part of a crew only after the apprentice has been instructed and trained in the duties or work procedures required, has performed such work under direct supervision, and is capable of performing such work safely as stipulated by definition in Utility Bulletin: TD-2355B-001 Publication Date: 07/12/2011 Rev: 1.

HIGHER CLASSIFICATION

During the ATSO Program, no Apprentice shall be temporarily assigned to a higher classification.

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EFFECTIVE DATES

The ATSO Program provides for four (4) six (6) month Steps. The ATSO Program will be offered at appropriate start dates set by the Company. The effective start date will be the first day of the ATSO Program for Step 1. The scheduled completion dates for each Step will be set as six (6) months after the start of each Step. As noted herein, the Apprentice is expected to complete the program within the specified 24 months, but may extend the total program up to a total of 27 months as described herein.

ADVANCED PLACEMENT

At the supervisor's request and with the concurrence of the IBEW business representative, persons with advanced skills (i.e., previous experience in the trade, military or civilian training, etc.) may be evaluated by the JATC together with the LRC. If the evaluation shows that the skill and knowledge displayed warrant advanced placement, the person may enter the apprenticeship at the appropriate training phase determined by agreement between the JATC and the LRC.

ADVANCED PROGRESSION

Once the Program begins, in order to reinforce learning and continue to progress with their classmates, an Apprentice will not be granted advanced progression. Hour requirements built into the program are specifically designed to provide the Apprentice with the time needed to competently learn the required tasks. If the Apprentice knowledge, skills or abilities is advanced, the instructor will provide them with increasingly complex situations, challenges, and opportunities to apply critical thinking applicable to their level of expertise.

ATSO HEADQUARTERS

The headquarters for the ATSO is designated as the GCC/GCC Annex for Steps 1, 2, and 3. Upon completion of Step 3 the Apprentice will be assigned to an area for completion of Step 4 and the Apprentice shall be considered that assignment location through the end of the Program.

WORK SCHEDULES

Apprentices will be scheduled so that the specified training can be completed. Apprentice Operators are shift employees. Apprentice's basic work week shall be Monday through Friday consistent of eight (8) hours and shall commence no earlier than 6:00 am and no later than 9:00 am. The regular start times shall be determined by mutual agreement. When an Apprentice is assigned to shift, they will assume the schedule of their working-shift. Based on training and operational needs, both parties may agree to alternative work schedules that best support the need of the Company and the Employee. The Company and Union will continue to monitor the work schedule and agree to meet and discuss any further impacts related to the Apprentice.

SUPERVISION

To facilitate consistency throughout the ATSO Program, the Apprentice will be temporarily assigned to the TSO Training Supervisor until completion of Step 4. Attachment 1, Notification of Training Assignment Form will be used.

At the completion of Step 3 of the ATSO Program, the Apprentice will be assigned to an area with an Operating Shift Supervisor for support, by the TSO Realtime Operations Manager. Both Supervision and the Apprentice Coordinator will validate completion of Step 4 to be submitted for approval to the LRC.

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REAL TIME WORK EXPERIENCES

The ATSO Program provides a framework for the Apprentice to gain real work experiences through OJT, FET, Simulation, and assigned Field Visits - all known as On-the-Job Experience (OJE). The Apprentice may be required to travel to any portion of the system at any time to gain this experience. This experience provides the Apprentice with specifics of different facilities and geographic regions within the service territory.

The specific training, experience, and duration of any real time work experiences must be documented as indicated herein and provided to the Local Review Committee as outlined in the reporting requirements of the Program (ATSO Training Program Requirements Matrix Table). The Apprentice Coordinator is responsible for monitoring and tracking to ensure the Apprentice is receiving the required experience.

OUTSIDE ACTIVITIES

All apprentices should expect to spend time away from their assigned locations, as necessary, to complete all training and field assignments required for successful completion of this Program.

Travel

Travel time may NOT be included for purposes of meeting the hourly requirements of the ATSO Program. The Apprentice should track, and include, travel time for time keeping purposes in accordance with PG&E procedures.

For temporary training assignments more than 50 miles from the assigned location, the specific training task(s) and duration will be identified in writing and communicated to the Apprentice and appropriate personnel at least 48 hours prior to the assignment. The Apprentice Coordinator will be responsible for monitoring and tracking the frequency of these assignments. The company and union will continue to monitor the mileage limitation and agree to meet and discuss it further should it impact operations.

OVERTIME

Overtime, while participating in the ATSO Program, shall be minimized. Where overtime is necessary, the Apprentice Coordinator and Apprentices should ensure that overtime does not interfere with:

- Self-study activities and preparation for Assessment tests within the ATSO Program.
- Any classroom, simulation, or field assignment that is assigned as part of the ATSO Program.

In order to maintain continuity of service and efficiency, the Apprentice Coordinator and/or Supervisor will manage mandatory and voluntary Apprentice overtime to minimize any adverse impact on the ATSO.

TRAINING REQUIREMENTS

This section provides more specific training requirements relevant to the ATSO and their successful completion.

Training is comprised of Instructional and On-the-Job Experiences (OJE's). It requires:

- **Notification:** Training for Apprentices is scheduled by the Apprentice Coordinator and a confirmation shall be provided to the Apprentice and appropriate personnel.
- **Temporary training assignments more than 50 miles from the assigned location:** The specific training task(s) and duration will be identified in writing and communicated to the Apprentice and appropriate personnel at least 48 hours prior to the assignment.
- **Pre-Requisites:** Training may require mandatory, pre-requisite preparation by the Apprentice before completion or participation. The Apprentice must complete all pre-requisites as required by and within the prescribed timelines identified in the Program. If it is determined that the Apprentice has not completed any required mandatory pre-requisite requirements, the Apprentice may not be allowed to participate and will not receive credit for completion of that portion of the training.
- **Self-Study:** All Steps of the ATSO Program may require mandatory self-study assignments that require completion outside normal work hours.

INSTRUCTIONAL ACTIVITIES

- Each Step will include classroom training which will be instructor led, or face-to-face via web cast. This type of training will be at specified times and locations and will be instructor interactive.
- E-Learning is considered independent, self-paced, Computer Based Training (CBT), or Web-Based training. Each Step may include either one or both of these types of E-Learning.

ON-THE-JOB EXPERIENCE:

- Includes Field Experience Training (FET), Simulation, On the Job Training (OJT) and Lab Work. These vary through the Steps and in general the OJT will increase as the Apprentice moves through the Program.
- **Field Experience Training (FET)** is defined as activity outside the control center or in the field under the Direct or Indirect Supervision from appropriate personnel. For all FET activities the following must be applied:
 - Direct Supervision requires that a qualified person is available and present to take immediate control from the Apprentice.
 - Indirect Supervision requires that the Apprentice has completed necessary training and demonstrated specific proficiency to complete the assigned task. Under Indirect Supervision, a qualified person may NOT be available to take immediate control from the Apprentice.
 - FET will be given in each Step of the ATSO Program depending on the experience requirements for that Step.
 - All FET assignments shall be in accordance with all regulatory requirements.
 - FET assignments will increase in complexity and responsibility as the Apprentice attains increased knowledge, skills, and competency to perform the assigned tasks.
 - Participation in any special event or FET outside the normal training sequence of the ATSO Program shall be considered on a case by case basis with approval from the Apprentice Coordinator.
- **Simulation Training (ST)** is defined as scheduled training using a variety of system simulation tools, software, or scenarios designed to emulate expected events related to required position tasks and assignments. Simulation training will be conducted in all Steps of the ATSO Program and will coincide with the learning objectives.

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- **On the Job Training (OJT)** is defined as activity within the Headquarters under the Direct or Indirect Supervision from appropriate personnel. For all OJT activities the following must be applied:
 - Direct Supervision requires that a qualified person is available and present to take immediate control from the Apprentice.
 - Indirect Supervision requires that the Apprentice has completed necessary training and demonstrated specific proficiency to complete the assigned task. Under Indirect Supervision, a qualified person may NOT be available to take immediate control from the Apprentice.
 - OJT will be given in each Step of the ATSO Program depending on the requirements for experience in that Step.
 - All OJT assignments shall be in accordance with all regulatory requirements.
 - OJT assignments will increase in complexity and responsibility as the Apprentice attains increased knowledge, skills, and competency to perform the assigned tasks.
 - Participation in any special events or OJT outside the normal training sequence of the ATSO shall be considered on a case by case basis with approval from the Apprentice Coordinator.

- **Lab Work** is defined as exercises or activities using a variety of tools, software, or scenarios designed to emulate expected events related to required position tasks and assignments. Lab work will incorporate application of the lessons learned from the respective course(s) and will be conducted in all Steps of the ATSO training Program (e.g. switch writing tasks).

ATSO PROGRAM OVERVIEW

The ATSO Program has been divided into four (4) separate Steps. Each is designed to provide for the necessary instructional and On-the-Job Experiences (OJE's) in order for the Apprentice to progress in knowledge, skill and task proficiency. Step 1 provides general overview and training necessary to understand the system and provide an introduction for the Apprentice to the work environment. To acclimate an Apprentice to shift work, there will be a four (4) week block shift rotation, which best represents the current shift schedule, that each Apprentice will assume in Step 1 (to be approved by the LRC). Step 2 builds on Step 1 and provides more complex intermediate and technical Instructional and On-the-Job Experiences (OJE's). Step 3 is an advanced level and is designed to ensure that the Apprentice can perform all tasks and assignments of the position. Step 4 is reserved for Area specific training and seasoning. The Apprentice is expected to be fully competent in all tasks and assignments at the end of Step 4. The following table summarizes the overall program:

ATSO Program Overview				State Certification
Year	Phase/ Wage	Duration	Overview	Hours
Year 1	1	1-6 months	Basic Transmission System Operating	1000 hrs
	2	7-12 month	Intermediate Transmission System Operating	1000 hrs
Year 2	3	13-18 month	Advanced Transmission System Operating	1000 hrs
	4	19-24 month	Jurisdictional Transmission System Operating	1000 hrs
Placeholder	3	3 months	NERC Certification	N/A

Apprentice TSO Administration Procedures Manual

TRAINING ASSIGNMENTS

The ATSO Program is designed to provide a progressive training environment for the Apprentice. In general, the Steps are designed for:

- Step 1 – Introduction/Understand task requirements and responsibilities
- Step 2 – Intermediate/Apply knowledge of task requirements and responsibilities
- Step 3 – Advanced/Demonstrate competency in task requirements and responsibilities
- Step 4 – Seasoned/Demonstrate system area specific proficiency and seasoning

This approach provides the Apprentice with the necessary training, both Instructional and On-the-Job Experiences (OJE's), for progression through each Step.

TRAINING AREAS

The ATSO Program requires that the Apprentice follow the training progression outlined above in the following areas:

- System Monitoring and Control
- Voltage Control
- Transmission Outage Scheduling and Coordination
- Switching & Clearances
- Responding to Forced Transmission Outages
- Routine Switching
- Test Program Preparation and Switching
- Responding to Relay Operation
- Generation Unit Operation
- Generation Outages
- Monitoring Metering and Data & Voice Communications Systems
- Data & Voice Communications System Outage Scheduling & Coordination
- Protective System Outage Scheduling & Coordination
- Monitoring and Testing Control Center Equipment
- System Restoration
- Control Center Emergencies
- Non-System Emergencies
- Severe System Disturbances and EEP's
- Logs, Reports, and Notifications
- Document and System Maintenance and Upgrade

In addition, switchmen training and field experience training (FET) is provided at different intervals throughout the program. The purpose of switchman training and field applications are to enhance the learning process as an ATSO and **not** to have the Apprentice perform as a switchman.

Depending on the Step and detailed training or FET/OJT, the Apprentice may be required to complete the training tasks in any or all of these areas. At the end of Step 3, as noted in the ATSO Training Program Requirements Matrix, the Apprentice is expected to fully demonstrate proficiency with all areas covered. In Step 4 of the ATSO Program, the Apprentice is expected to demonstrate proficiency in all tasks specific to an area within the PG&E system. The training program curriculum is added as an Attachment to this document, will be updated as the program is enhanced, and will be subject to annual review and revision.

Apprentice TSO Administration Procedures Manual

PROGRAM PROGRESSION

The ATSO Program is intended as a progression program where each Step adds or leads to more complex skill and knowledge requirements.

- The Program is intended to be completed as a sequential, building block training which incorporates classroom, independent learning, simulation, FET, OJT, and Lab Work.
- All Steps of the ATSO Program must be completed prior to the achievement of Journeyman Transmission System Operator Status.
- Steps will be designed so that the ending or beginning from one Step to the next Step will be review or application of skills. This will allow any Apprentice needing an Action Plan to rectify their deficiency without missing any new material.

TRAINING DOCUMENTATION

All training during the Apprenticeship, including Instructional and On-the-Job Experiences (OJE's), must be documented and provided to the TSO Apprentice Coordinator. In addition:

- Apprentice Assessments (i.e. knowledge tests, performance measures, competency activities) will be considered confidential and may not be duplicated.
- The Apprentice is expected to verify all individual records and ensure they are up to date and accurate throughout participation in the ATSO Program.
- All records are subject to review and if it is determined that records have been intentionally falsified, the Apprentice will be subject to review and may be subject to discipline and or discharge.

The Apprentice Coordinator will make reports and assessments available to the Apprentice Transmission System Operator Supervisor and the Local Review Committee to show a continued status of the Apprentice. These reports and assessments will be used to determine outcomes and schedule all training.

The ATSO Program will be reviewed and revised at least annually or as required by regulatory agencies and Company standards and policies.

Permanent Records

All documented information is considered permanent for the Apprentice through the Program and shall be kept on file as required under Company policies and procedures.

Apprentice Responsibilities

All Instructional and On-the-Job Experiences (OJE's) must be fully documented in order to receive credit against the Program requirements. The Apprentice is responsible for maintaining, recording and verifying for accuracy all normal recordkeeping including FET and OJT activities.

Access to Training Records

Training records will be made available to the Apprentice and Apprentice Coordinator, the LRC, and any appropriate Supervisor. All records are considered confidential and may not be copied or distributed without the approval of the Apprentice Coordinator.

Apprentice TSO Administration Procedures Manual

The following ATSO Training Program Requirements Matrix summarizes the general reporting requirements of the ATSO:

ATSO Training Program Requirements Matrix

Role	Weekly Report	Performance	OJT & FET	90 Day Review Report	Step Requirements Checklist	Ongoing Activity Checks and Assessment Tests	Step Progression Test (SPT)	Step 4 Criteria for Taking Shift	
Apprentice	Required	Must Comply	Document	Input and Review	Document	As Required	Required for Advancement	Required	
Apprentice Coordinator	Review as Necessary	Exception Reporting (good or unacceptable)	Monitor	Develop & Review	Verifies Completion as Necessary	Review as Necessary	Coordination and Implementation of Actions	Coordination of Activities and Assignments. Recommendation to LRC	
Training Roles (Instructor, Facilitator, Mentor, Evaluator)			Provide as Necessary	Input	Verify as Necessary	Provide as Necessary	Implement Step Progression Test	Complete Assessment and Recommendation to Apprentice Coordinator	
Subject Matter Expert (SME)			Provide as Necessary			Provide as Necessary			
Field			Review as Necessary	Input and Review		Review as Necessary	Support any Action as Necessary	Coordination of Activities and Assignments	
Supervision			Review as Necessary	Review as Necessary	Review	Reviews as Necessary	Review as Necessary	Review Results and Identify Actions	Final Review and Action
LRC									

ATSO PROGRAM OUTCOMES

The ATSO Program and participation by the Apprentice is intended to provide an opportunity for each Apprentice to obtain Journeyman Transmission System Operator status. While PG&E has developed the Program to provide the framework for completion, the Program requires detailed assessments at regular intervals to ensure that the candidate meets the required standards set by the ATSO Program.

ASSESSMENTS

The Program is designed for specific types of ongoing assessments to ensure the Apprentice, the Apprentice Coordinator, and related parties, receive information on the performance of the Apprentice and to improve the Program's effectiveness.

For all Instructional and On-the-Job Experiences the assessment includes:

- Demonstration of ability to perform applicable tasks in each respective Step of the ATSO Program
- Successful completion of all objective assessment criteria related to skills and knowledge.

All assessments are designed to be fair and objective.

ADVANCEMENT

The ATSO progression is based on advancing within each Step by taking assigned Instructional and On-the-Job Experiences (OJE's), and successfully completing all assessments. In addition, each Step requires FET, Simulation, OJT and Lab Work through assignment. Advancement through each Step and the Program requires that the Apprentice successfully complete all assignments as outlined.

SUCCESSFUL COMPLETION

In order to successfully complete the ATSO Program, the Apprentice must successfully complete all assessment criteria outlined herein. Examples of Program success standards are included below but are not necessarily a full list of requirements:

- Complete all pre-requisite training requirements
- Consistently attend all scheduled training on time
- Complete all assigned Instructional and On-the-Job Experiences (OJE's) (Step Requirements Checklist)
- Successfully complete all required knowledge, skills, and performance assessments
 - Ongoing Activity Checks
 - Assessment Tests
 - Step Progression Test (SPT)
 - Step 4 Criteria for Taking Shift
- Fulfill any applicable time required
- Maintain accurate documentation of time and records
- Receive Local Review Committee (LRC) approval

STEP 1-3 PROGRESSION COMPLETION

Each Step of the ATSO Program has unique training requirements and a successful completion of each Step will allow the Apprentice to progress to the next Step. As the Apprentice progresses through the Program they gain skills, knowledge and competency to perform their tasks, thereby becoming more productive on the job.

The advancement is a promotion and must be earned by completion of the following as they relate to each Step:

- Complete all pre-requisite training requirements
- Consistently attend all scheduled training on time
- Complete all assigned Instructional and On-the-Job Experiences (OJE's) (Step Requirements Checklist)
- Successfully complete all required knowledge, skills, and performance measurements
 - Ongoing Activity Checks
 - Assessment Tests
 - Step Progression Test (SPT)
- Fulfill any applicable time required
- Maintain accurate documentation of time and records
- Receive Local Review Committee (LRC) approval

There will be a total of three (3) Step Progression Tests (SPT's), one each at the conclusion of Step 1, Step 2, and Step 3. They will:

- Incorporate any knowledge, skills and competencies needed to perform the Step
- Be progressive in nature
- Include any form of assessment (i.e. written, simulation)

When the Apprentice successfully completes all Instructional and On-the-Job Experiences (OJE's) for each specific Step, the information must be properly reported to the Apprentice Coordinator. The Apprentice Coordinator will review all information and contact any other individual that may have information related to the Apprentice's performance during the specific Step. The Apprentice will be required to successfully complete the Step Progression Test (SPT) for that specific Step. The results of the SPT will be forwarded to the LRC and Apprentice Coordinator. The LRC will then approve advancement for the Apprentice to the next Step of the ATSO Program.

At the conclusion of Step 3, Apprentices will have completed all Step 3 SPTs and Step 4 will be reserved for Area specific shift taking requirements and seasoning.

STEP 4 PROGRESSION COMPLETION

Upon completion of Step 3 SPT and approval to advance to Step 4 of the ATSO Program, the Apprentice will have demonstrated the ability to perform day to day duties of a TSO. Although there is no SPT for completion of Step 4 of the ATSO Program, the Apprentice will be required to complete a Step 4 Criteria for Taking Shift. They will also be required to successfully complete all remaining requirements of the Program to become a Journeyman Transmission System Operator. The Apprentice Coordinator and assigned Supervisor will work together to ensure both the Instructional and On-the-Job Experiences (OJE's) are completed within the required time frame.

The Apprentice and appropriate personnel must document successful completion of all Step 4 requirements and relay that information to the Apprentice Coordinator. The Apprentice Coordinator will then recommend approval to the LRC for the Apprentice to complete the Program. The ATSO Program is not considered complete until all requirements have been successfully met for Step 4 and approval has been given by the LRC. Upon approval from the LRC, the Apprentice will have completed the Program. The documentation will be submitted to the State for approval and the Apprentice will be designated a Journeyman Transmission System Operator. Wage Progression will be as provided herein for this completion.

WAGE PROGRESSION (WP)

As the Apprentice moves through each Step, the increased value of their work will result in a corresponding increase in pay through approval to obtain the next Wage Progression (WP). For Steps 1, 2, and 3, when the Apprentice successfully completes the SPT, the Apprentice will advance to the next Step and will move to the next Wage Progression approved for the Program. In Step 4, the Apprentice must complete all remaining requirements and review from the LRC prior to the final ATSO Program Wage Progression.

There will be a total of five (5) wages starting at the initial base pay hired plus four (4) WP's (at the conclusion of Step 1, Step 2, Step 3 and Step 4).

Criteria to Obtain WP:

- A period of no less than 6 months for each Step
- Complete Step Requirements Checklist
 - check off list which identifies ALL activities, courses, lab, simulation, homework etc. that are required for completion of Step
- No negative "exception" reporting remaining in file
- Pass all Activity Checks and Assessment Tests as required
- Pass Step Progression Test (SPT) as applicable
- Recommended by the Apprentice Coordinator (input from others)
- Recommendation by the LRC

APPRENTICE BIDDING

Any bid to another Apprentice program within the company will constitute use of another Apprenticeship opportunity. Should an Apprentice bid to another Apprentice Program and wish to return to the ATSO Program, re-entry will follow the terms of the Master Apprenticeship Agreement and can only be petitioned by the LRC and approved by the JATC.

An Apprentice may bid to a non-Apprentice position but will be removed from the ATSO Program at the time the alternate position is accepted. If the Apprentice wishes to return to the ATSO Program, re-entry will follow the terms of the Master Apprenticeship Agreement and can only be petitioned by the LRC and approved by the JATC.

UNSUCCESSFUL PARTICIPATION:

There are specific requirements that must be achieved in order to successfully complete the ATSO Program. Specific areas where the Apprentice would be subject to removal or other action would include but are not limited to:

- Not meeting the required standard of achievement for any assessment described herein
- Not completing assignments, tasks, or other related work within required time limits
- Not consistently demonstrating the ability to make sound decisions within the progression of the ATSO Program
- Not completing any Action Plans in accordance with the Program requirements.

If during any evaluation period the Apprentice does not meet the required standards, the specific training requirements of this manual addresses the possible remediation or remedies that may apply. Apprentices, who cannot meet the standards of achievement required herein, and within the Master Apprenticeship Agreement (MAA), will be removed in accordance with the collective bargaining agreement.

UNSUCCESSFUL COMPLETION

The ATSO Program is designed to provide comprehensive training in each successive Step so that the Apprentice is afforded the best opportunity to be successful. However, there may be instances where the Apprentice has deficiencies (failures) that are identified through proper Evaluation measures. These deficiencies must be corrected to ensure the Apprentice moves through the Program successfully.

Step 1 Program Removal

A probationary Apprentice may be terminated for unsuitability without recourse to the grievance procedure. The terms of the Union's Title 206 Agreement will apply to all other cases.

- The company reserves the right to determine eligibility for re-hire for a new employee
- An ATSO that has been removed from Step 1 will not be allowed to continue through the program
- Re-entry to the ATSO Program will follow the terms of the Master Apprenticeship Agreement with the pre-requisite that the LRC must consider and approve such re-entry prior to completing the terms

Step 2-4 Program Removal

At any time during Step 2-4 the terms of the Union's Title 206 Agreement will apply to all Apprentices removed from the program.

Deficiency (Failure) Reasons

There are two reasons an Apprentice may be unsuccessful:

- Unsuccessful due to Company circumstances (e.g. FMLA, unable to provide training, lack of manpower etc.)
- Unsuccessful due to Apprentice circumstances (e.g. lacking in areas, unable to meet deadlines, etc.)

Criteria Applicable to Both Failure Reasons

- If there is a failure at Step 1-3 SPT, the LRC will review and determine re-testing timing which is recommended to be completed within 30 days
- Extensions, to the ATSO Program for a maximum of up to 3 months, can only be automatically used and granted in Step 4
 - Any other granting of such extension would inhibit and cause a deficiency in the next Step because the Apprentice will be studying for their deficiency and miss the instruction of the next Step

- If Step 4 requires an extension of time, the Apprentice will be:
 - Required to complete an Action Plan (AP)
 - Delayed from completion of the ATSO Program
 - Cannot sit shift independently
 - Cannot obtain a WP until the competency is demonstrated

Unsuccessful Due to Company Circumstances (Steps 1-4)

- HOLD/PAUSE Apprentice until they reach the step of the Step that they left off
- Requires an Action Plan
 - Understand that the LRC is not obligated to approve any AP and may either offer alternative remedial action.
- Requires Local Review Committee (LRC) Approval
- Extended absences will be handled in accordance with company policy

Unsuccessful Due to Apprentice Circumstances (Steps 1-3)

Deficiency Failure Points

Assessment Test Deficiency

- Must re-take Assessment Test within current Step and prior to the SPT
 - If not taken within time frame – removal from program
- Must be made available up to the time of the SPT
- Can take the same Assessment test a maximum of 3 times but must pass by the 3rd time
- The number of Assessment tests in each Step will equal the number of re-tries allowed in the Step
 - Unused re-tries do not carry to the next Step
- If the Apprentice is 1 attempt away from being removed from the program, an AP will be required
- If unsuccessful by the 3rd re-test or if total # of re-tries is at its maximum – recommended to JATC for removal from program

Step Progression Test (SPT) Deficiency

- SPT is given upon completion of all Step requirements within the respective Step
- Can take the same SPT a maximum of 2 times but must pass by the 2nd time
 - Upon the first failure requires an Action Plan
 - Second failure - removed from program

Incomplete Step Requirements Checklist within Step Time Frame

- Apprentice will:
 - Continue to the next Step of the program (but they are not considered a next Step Apprentice)
 - Be ineligible for SPT until deficiencies corrected and LRC review
 - Be ineligible for WP until SPT and LRC review
- Requires an Action Plan
 - For FET and OJT the AP must identify a specific time frame and outline for making up all deficiencies within 90 days or less of completion of any specific Step of the Program
- Referred to the LRC to be handled on a case by case basis

Unsuccessful Due to Apprentice Circumstances (Steps 4)

If Step 4 requirements are not met or an extension is requested, the Apprentice will be:

- Required to complete an Action Plan
- Delayed from completion of the ATSO Program
- Cannot sit shift independently
- Cannot obtain a WP until the competency is demonstrated
- Removed from the program if it exceeds the program allotted time

Action Plan

The Apprentice is afforded some opportunities to develop an Action Plan if there are continued deficiencies in an area of the Program. The AP must:

- Be designed with the Apprentice Coordinator and Apprentice (with input from others)
- Be specific and include a time line for making up any and all deficiencies as well as address any work issues that may result due to delays in completing Steps of the Program as scheduled
- Be reviewed by the LRC
- Be accepted by the JATC

Understand that the LRC is not obligated to agree with the AP and may either recommend alternative remedial action or recommend removal from the Program.

UNSUCCESSFUL COMPLETION SUMMARIES

Situation	Circumstances	Consequences
Removed from ATSO Program < 6 months	• Probationary employee can be removed for unsuitability	<ul style="list-style-type: none"> • Removed from ATSO program and cannot continue • Apprenticeship counts as one of two Apprenticeship Program opportunities • Any possible re-entry requires pre-approval by LRC and will follow the terms of the Master Apprenticeship Agreement • Company reserves the right to determine eligibility for re-hire (external hire)/ OR Follows Union 206 Policy (internal hire)
Removed from ATSO Program > 6 months	• More than 6 month employee	<ul style="list-style-type: none"> • Removed from ATSO program and cannot continue • Apprenticeship counts as one of two Apprenticeship Program opportunities • Any possible re-entry requires LRC review and will follow the terms of the Master Apprenticeship Agreement • Follows Union 206 Policy
Unsuccessful due to Company Circumstances	<ul style="list-style-type: none"> • Examples: <ul style="list-style-type: none"> o FMLA o unable to provide training o lack of manpower 	<ul style="list-style-type: none"> • HOLD/PAUSE Apprentice until they reach Step they left off • Requires Local Review Committee (LRC) Review and Acceptance by JATC • Requires an Action Plan (LRC is not obligated to approve and may offer alternative) • Extended absences handled in accordance with company policy
Continued deficiencies in an area of the Program	Action Plan	<ul style="list-style-type: none"> • Designed with the Apprentice Coordinator and Apprentice (input from others) • Written to be specific, include time line, address any work issues resulting from delay • Reviewed by the LRC (LRC is not obligated to approve and may offer alternative or recommend removal from program) • Accepted by the JATC
Exception	Extension of Time to Program	• Can only be used and granted in Step 4 for a maximum of up to 3 months

Unsuccessful due to Apprentice Circumstances (steps 1-3)

Evaluation Methods	Number of Retakes Permitted	Requires Action Plan (AP)	Removal	Notations
Assessment Test	2 per test	When one step prior to removal	<ul style="list-style-type: none"> • 3rd failure or exhaustion of total re-takes • Re-take exceeds Step timeframe 	<ul style="list-style-type: none"> • Re-takes cannot exceed total # of Assessment Tests in a Step • Unused re-tries do not carry to the next Step
Step Progression Test	1 per Step	after 1st failure	2nd failure	
Step Requirements Checklist	NO SPT or WP until complete	immediately	case by case	

Unsuccessful due to Apprentice Circumstances (step 4)

Evaluation Methods	Number of Retakes Permitted	Requires Action Plan (AP)	Removal	Notations
Requirements aren't met	N/A but may automatically use up to a 3 month extension	immediately	Action Plan not met and/or exceeds extension allotted	<ul style="list-style-type: none"> • Delayed from completion of the ATSO Program • Cannot sit shift independently • Cannot obtain a WP until the competency is demonstrated

RESOLVING CONFLICTS AND APPEALS PROCESS

Informal Resolution

Problems and conflicts concerning the Apprentice should be resolved at the lowest possible level, preferably with direct one-on-one discussion with the concerned parties. For issues that continue, the Apprentice Coordinator must be notified. The Apprentice Coordinator should try to resolve issues as effectively as possible. The Apprentice will follow corporate policy regarding any Compliance and Ethics concerns.

LRC Involvement for Disputes

Where the Apprentice Coordinator and Apprentice or others are not able to resolve issues or disputes, the matter shall be referred to the LRC. The Apprentice Coordinator will make a recommendation on any appropriate action, and the Apprentice may provide direct or indirect information to the LRC. The LRC shall recommend final action or remedy to resolve any issue. The LRC may refer the matter to the JATC for acceptance as necessary.

Formal Grievance

Any dispute regarding these measurement tools not resolved by the Local Review Committee will be subject to the grievance procedure (Title 102) with the option of expedited referral to the JATC for a recommendation of settlement after the timely filing of a grievance.

HARASSMENT FREE WORKPLACE

As stated in the Employee Code of Conduct, "At PG&E, we are committed to maintaining a work environment that respects individual differences. Conduct yourself in a professional manner and treat others with respect, fairness, and dignity. PG&E does not tolerate harassment or discrimination, including behavior, comments, jokes, slurs, email messages, pictures, photographs, or other conduct that contributes to an intimidating or offensive environment. This includes using personal electronic devices on company time or in company work environments. Remember others may see what you're doing.

Harassment and discrimination also can occur in the form of bullying, initiation activities, or workplace hazing, which can be humiliating, degrading, or cause emotional or physical harm. No forms of harassment or discrimination are tolerated, regardless of the employee's willingness to participate; such conduct can result in termination.

You must comply with applicable federal, state, and local statutes prohibiting conduct that could reasonably be construed as sexual in nature, or discrimination or harassment based on race, color, religion, age, sex, pregnancy, physical or mental disability, national origin, ancestry, medical condition, veteran status, marital status, sexual orientation, gender identity, gender expression, genetic information, or any other non-job-related factor. This applies to all employment practices, including advancement, disciplinary decisions, benefits, training, and general workplace conduct.

Employees in supervisory and leadership positions are expected to be familiar with PG&E's standards on harassment and discrimination and with relevant federal, state, and local laws. Supervisors who fail to take action, engage in harassment, or permit harassment to occur not only expose PG&E to liability, they also expose themselves to personal liability. Employees also can be held personally liable for engaging in harassment.

PG&E has the same expectations for its contractors, consultants, and suppliers when they engage in PG&E-related work. Those expectations are described in PG&E's Contractor, Consultant, and Supplier Code of Conduct."

Please refer to the current on-line "Employee Code of Conduct" for additional information.

ASSESSMENT POLICY

The ATSO Program provides an objective method to assess progression and measurement of the Apprentice's skills, knowledge, competency and proficiency. The evaluation of this information along with the appropriate review and approval is necessary to ensure the Apprentice has met all established standards and conditions.

PURPOSE

The purpose of all required ATSO assessments is to permit the Apprentice to display the mastery of required skills, knowledge, competency and proficiency. The Apprentice must pass all assessments that are part of the ATSO Program as well as the Step Progression Tests required.

CONTENT

All assessments are based on the stated learning and performance objectives directly related to the Journeyman Transmission System Operator Position and associated task requirements.

ASSESSMENT TYPES

(Also see "[ATSO Training Program Requirements Matrix](#)")

Weekly Report

- Summarizes and Assesses Apprentice weekly accomplishments
- Used as reference for creating 90 Day Review

Performance

- Assesses exceptional and unacceptable performance
- Only used to report exceptions

On-the-Job Training (OJT) and Field Experience Training (FET)

- Assesses time requirements spent in the Headquarters and in the Field for specific assignments

90 Day Review Report

- Identifies successes, accomplishments, future goals and areas for improvement every 3 months
- Reviewed with the Apprentice and other Roles as applicable
- Required for State Certification

Step Requirements Checklist

- Document which lists and identifies ALL activities, courses, simulation, FET, OJT, Lab work, homework, assessments, etc. that are required for completion of the Step

Activity Checks

- Mini assessments which, if not passed, are not considered deficiencies
 - Examples include:
 - Activity Knowledge Check – assesses knowledge learned
 - Activity Skill Check – assesses ability to perform a skill(s)
 - Activity Competency Check – assesses ability to perform skill at proficiency level
 - Coaching may be needed
 - Additional training or re-training may be needed
 - Re-take of mini assessment or evaluation may be needed

Assessment Tests

- Key Assessments given at the end of a course/session/critical component
- Assessment Test can be any critical components that could include, but is not limited to demonstration, simulation, field performance, written knowledge
- Prepares the Apprentice for the Step Progression Test
- Evaluated and used to identify progression or deficiencies/failures

Step Progression Test (SPT)

- Cumulative Assessment of the respective Step which tests for knowledge, skills, performance or competency in that Step
- Evaluated and used to identify successful progression or deficiencies/failures
- Determines ability to request WP

Step Progression Test (SPT) Policy:

- All SPT's will test for competency to include knowledge and skill components and have a time limit for completion.
- SPT's will be given as part of the regular curriculum with a minimum of two-week advance notice of their timing.
- Apprentices will be eligible take the SPT only after they have completed all training requirements for the Instructional and On-the-Job Experiences (OJE's) associated with that SPT.
- Apprentices must present valid photo ID (driver's license or company ID card) for admission to the test.
- Apprentices will not be scheduled for real-time work or operations over a test unless a corporate emergency exists which requires their assistance in Operations when all other resources have been exhausted.
- Apprentices that arrive late for a SPT will not be admitted and must comply with deficiency remediation identified herein.
- Apprentices who miss a test (or leave prior to completion) for an excused reason, such as illness must comply with deficiency remediation identified herein.
- SPT's are an individual effort and only authorized aids or references are permitted. Any Apprentice found cheating during any SPT will receive a failing grade for the test and must comply with deficiency remediation identified herein. Any Apprentice found cheating will be subject to disciplinary action up to and including removal from the ATSO Program and termination.

Step 4 Criteria for Taking Shift

- Apprentices shall demonstrate proficiency in all job tasks and assignments including Area specific requirements and position seasoning.
- A lack of competency does not create a deficiency/failure point, however, if success requires additional time, the Apprentice will be:
 - Delayed from completion of the ATSO Program
 - Cannot sit shift independently
 - Cannot obtain a WP until the competency is demonstrated
- Apprentices must have completed all hour requirements

ROLES AND RESPONSIBILITIES

The ATSO Program is designed around a wide variety of support personnel and specific skills and knowledge training for the Apprentice. The roles and responsibilities of each individual member provide a direct and/or indirect support to the Apprentice during the progression process. These roles are critical to meeting the increasing requirements of working knowledge in the system as well as considering all aspects of safety while working within the Transmission System Operations area.

ROLES

The following key roles are identified in the ATSO Program:

- Apprentice
- Apprentice Coordinator
- Training Roles
 - Instructor
 - Facilitator
 - Mentor
 - Evaluator
- Subject Matter Expert (SME)
- Field Personnel
- Supervision
- Local Review Committee (LRC)

For each role an understanding of their purpose, responsibilities, decision making and overall assessment responsibilities is necessary to ensure the Apprentice has all the necessary resources at their fingertips.

APPRENTICE ROLE

Safety

- Learn and observe the safety rules and procedures applicable to the tasks being performed.
- Safety is a condition of employment and must be woven into the Apprentice's daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

The Apprentice meets all criteria for being eligible for the ATSO Program. The main goals are to:

- Be safe
- Learn - The acquisition of knowledge and skills through instruction, practice, study, and experience
 - Observe
 - Listen
 - Ask Questions
 - Apply
 - Review
 - Implement
 - Evaluate
- Be Professional – follow the accepted core attitudes and behaviors

Responsibilities

- Effectively takes direction and guidance from appropriate parties
- Ensures Instructional and On-the-Job Experience contact hours are maintained throughout the Program
- Completes assignments in a timely manner
- Promptly reports any safety or direct issues to appropriate parties
- Work in conjunction with the Apprentice Coordinator for any Action Plans as necessary

Decision Making Authority

- Individual safety while performing all tasks and assignments
- 100% participation and ownership of Apprenticeship
- Stop, Think, Act, Review (STAR) regularly throughout program
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

APPRENTICE COORDINATOR ROLE

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Model safe practices weaving them into the daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

- Oversees the ATSO Program
 - Delegates daily information and coordination
 - Monitors, Tracks, Recommends and Reviews all Steps
 - Ensures Apprentice receives effective training
 - Liaison between all departments, positions and entities
 - Evaluates Apprentice (Participants) and Program for continual improvement
- First point of contact for all Apprentices until completion of their Program
- Chairman and Advisor to the LRC

Positions That Can Fulfill This Role

This position is filled by the Training Supervisor who oversees the Transmission System Operator Training Programs. The Apprentice Coordinator may choose to delegate duties to other Instructors under their direct supervision where qualified.

Responsibilities

- Enhancement and Improvement of Program to meet Company needs
- Direction of all levels of Program
- Direct and indirect facilitation and congruency between all roles
- Direct and indirect contact, guidance and supervision for all Apprentices
- Participation on necessary review committees
- Step 4 coordination and implementation with Supervisor and Apprentice for all required activities
- Directs, Advises, and provides all documentation support for the LRC
- Develops and coordinates all Action Plans as necessary
- Insures compliance with regulatory bodies

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Schedule and Attendance requirements
- Program budget adherence and approvals
- Development or use of both internal and external resources
- Ultimate coordinator of Apprentice outcomes
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

TRAINING ROLES

These roles apply to the various training positions as part of the ATSO Program.

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Model safe practices weaving them into the daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

There are many supporting training roles to assist the Apprentice throughout the Program, each one having a slightly unique function and varied responsibilities. Collectively, they are all there to help insure the Apprentice's success by providing learning opportunities and growth. These roles are explained below and include:

- Instructor
- Facilitator
- Mentor
- Evaluator

INSTRUCTOR ROLE

Safety Refer to “Training Roles”

Description

- Is under the direction of the Apprentice Coordinator Role
- Oversees the Training Functions
- Follows a Systematic Approach to Training (SAT) process
- Supports, Apprentice Coordinator, TSO's and Dispatchers in real-time operations
- Understands and complies with regulatory bodies as they relate to training (i.e. NERC Training, State Apprenticeship)
- Provides training, coordination, curriculum development and instructional design as needed
- Evaluation and assessment of Apprentice and Program for continual improvement

Positions That Can Fulfill This Role

- Training Supervisor
- Training & Simulation Specialist
- Apprentice Coordinator
- Power System Operator School (PSOS) as authorized by Apprentice Coordinator
- Accredited College as authorized by Apprentice Coordinator

Responsibilities

- Provides direct interaction and training to Apprentice
- Apprentice scheduling, assessment, and day to day performance
- Coordination of internal and external resources for effective training outcomes
- Provides feedback to others
- Designs, delivers and revises training as appropriate with Apprentice Coordinator approval
- Proper reporting and evaluation

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Makes decisions on behalf of Apprentice Coordinator as delegated
- Modifications to individual module schedules and resources as necessary
- Adherence to necessary budgets and requirements
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

FACILITATOR ROLE

Safety Refer to "Training Roles"

Description

- Is under the direction of those in the Instructor or Apprentice Coordinator Roles
- Guides learning
- Encourages and coaches group and individual discussion
- Makes suggestions and provides guidance for all questions
- Provides training, training content and training materials as needed
- Evaluation of activities and Program for continual improvement

Positions That Can Fulfill This Role

- Journeyman TSO
- Lead System Operator
- Outage Coordinators
- Engineers
 - Operating
 - Protection
- Dispatchers
- Instructor Role (all potential positions within this role)
- Subject Matter Expert (SME) Role
- Field Role (all potential positions within this role)
- Supervision Roles (all potential positions within this role)

Responsibilities

- Provide direct interaction during training to enhance outcomes and provide individualized training based on Apprentice needs
- Ensure effectively takes direction and guidance from appropriate parties
- Ensures Instructional and On-the-Job Experience contact hours are maintained throughout the Program
- Promptly reports any safety or direct issues to appropriate parties
- Provides feedback to others
- Designs, delivers and revises training as appropriate with Apprentice Coordinator approval

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

MENTOR ROLE

Safety **Refer to “Training Roles”**

Description

- Is under the direction of the Apprentice Coordinator Role is considered a role model Transmission System Operator (TSO) assigned by the end of Step 1
- Is qualified to perform all of the tasks of a TSO
- Exhibits model core attitudes, behaviors and professionalism required of a TSO
- Leads the Apprentice in the Program using on-the-job training techniques (in the control room, in the field, and on the desk, while operating and using real-time experiences)
- Provides consistent positive reinforcement, feedback, and multiple “teachable moments” to the Apprentice
- Available in multiple forms of communication (email, phone, person) during normal hours of operation to answer any questions the Apprentice might have throughout the Program

Position That Can Fulfill This Role

- Journeyman TSO
- Lead System Operator (LSO)

Responsibilities

- Provides a resource for Apprentice on a consistent basis
- Provides direction and system knowledge based on experience
- Ensures personnel safety when directing Apprentice activities
- Non-confrontational source of guidance and direction

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Direct responsibility for Apprentice when necessary
- Review and Evaluation of Apprentice progress and recommendation related to future Apprentice needs
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

EVALUATOR ROLE

Safety Refer to “Training Roles”

Description

- Is under the direction of those in the Instructor Role
- Is qualified to assess the Apprentice’s abilities to perform the tasks at the level of the Step the Apprentice is in
- Provides constructive feedback on the accuracy of a identified task
- Provides assessment of tasks and Apprentice for continual Program improvement

Positions That Can Fulfill This Role

- Journeyman TSO
- Lead System Operator
- Outage Coordinators
- Engineers
 - Operating
 - Protection
- Dispatchers
- Instructor Role (all potential positions within this role)
- Subject Matter Expert (SME) Role
- Field Role (all potential positions within this role)
- Supervision Roles (all potential positions within this role)

Responsibilities

- Evaluation of Apprentice and Program over specific time periods for continual improvement
- Direct interaction with Apprentice on specific topics and learning objectives
- Provides feedback to others

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Modifications to overall Program direction, content, and structure with appropriate input from all responsible parties
- Adherence to necessary budgetary requirements
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

SUBJECT MATTER EXPERT (SME) ROLE

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Models safe practices weaving them into a daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

- Is under the direction of those in the Instructor, Apprentice Coordinator, or Supervision Role
- Has proficiently completed and performed the task, topic or material which requires their expertise
- Has the specified years of experience in the subject and/or is identified by their peers as the “go to” person for their respective subject matter
- Is recognized as a Subject Matter Expert by definition under NERC guidelines

Positions That Can Fulfill This Role

- Journeyman TSO
- LSO – Lead System Operator
- Outage Coordinators
- Engineers
 - Operating
 - Protection
- Dispatchers
- Instructor Role (all potential positions within this role)
- Field Role (all potential positions within this role)
- Supervision Roles (all potential positions within this role)

Responsibilities

- Provides specific input to topics where qualified directly or indirectly to Apprentice
- Relates technical information in a manner that can be understood by Apprentice
- Provides guidance and direction for development

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Direct control over Apprentice when assigned specific tasks in SME qualification area
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

FIELD ROLE

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Model safe practices weaving them into daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

- Under the direction of the Apprentice Coordinator with direct input and approvals from Field Supervision
- Supervision is provided in accordance with company policies and procedures for specific field assignments
- Provides appropriate oversight and supervision for Apprentice to ensure Apprentice is qualified to perform assigned duties
- Ensures specific work and process are fully explained to Apprentice in accordance with company policies and procedures
- Assessment of Apprentice and performance for continual Program improvement

Positions That Can Fulfill This Role

- Journeyman Electrician
- Journeyman Switchman
- Qualified Communication, SCADA, or Test technician
- Qualified Department Supervisor
- Elec-Tech
- Com-Tech
- T-Line Crew
- T-Men
- SCADA Specialist
- Test Supervisor

Responsibilities

- Field experience relating educational information to hands-on training
- Direction of Apprentice necessary to develop skills, knowledge, performance and competency
- Step coordination with and implementation with Apprentice Coordinator, Supervisor, and Apprentice for all required activities
- All necessary information related to safely performing assigned tasks

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Direct and indirect field supervision when assigned
- Performance factors necessary for development and efficiency
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

SUPERVISION ROLE

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Model safe practices weaving them into daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

- Provides direct or indirect supervision on activities for Apprentice
- Secondary Point of Contact for disputes or issues related to performance, mentoring, assignments, or other areas involving Apprentice
- Provides Apprentice and Program assessment for continual improvement\
- Participates in all necessary assigned local review or other committees relevant to the Program

Positions That Can Fulfill This Role

- Training Supervisor
- Manager
- Lead Supervisor
- Operations Supervisor
- Operations Planning Supervisor
- Maintenance Supervisor
- Crew Forman

Responsibilities

- Direct supervision for all OJT and FET training as assigned
- Evaluation of proficiency during day to day operations
- Evaluation of progression in skills and knowledge
- Communication and Direction to other areas within Company
- All necessary information related to safely performing assigned tasks
- Step coordination with and implementation with Apprentice Coordinator and Apprentice for all required activities

Decision Making Authority

- Individual and Apprentice safety while directing and/or performing all tasks and assignments
- Direct Supervision
- Performance factors necessary for development and efficiency
- Recommendations for Apprentice to progress
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

LOCAL REVIEW COMMITTEE (LRC) ROLE

The Local Review committee (LRC) will be made up of a group of individuals that will be responsible for the overall evaluation of the Program as well as the Apprentice. The LRC will confer at least every three months to review and assess each Apprentice and the success of the Program.

Safety

- Ensure a safe work environment for the Apprentice
- Observe and encourage the Apprentice to follow the safety rules and procedures applicable to the tasks being performed.
- Model safe practices weaving them into daily routine
- Shortcuts, deviations from approved practices, or failure to observe all safety requirements will not be tolerated and are cause for termination.

Description

- Provides direct oversight to Apprenticeship Program
- Directs activities designed for continual Program improvement including assessment of feedback from other responsibility roles
- Assesses individual Apprentice performance and sets effective standards for Program completion
- Provides all necessary reporting for Program assessment to appropriate personnel
- Coordinates all Program activities with diverse interest groups, management and bargaining unit representatives

Representation

The LRC will be made up of at least one representative from:

- Instructor Role
- Subject Matter Expert (SME) Role
- Supervisor Role
- IBEW
- Apprentice Coordinator (Chairman/Non-voting Advisor)

At least one representative from the above areas will be selected by the Apprentice Coordinator and a Supervisor from the TSO area. The Apprentice Coordinator will schedule an initial committee meeting to prepare the committee Charter.

The Apprentice Coordinator is responsible to act as the Chairperson and Advisor to the Committee providing their recommendations. They will only provide a vote in the case of a tie of the Committee vote. The Apprentice Coordinator will provide the overall organization, Agenda, and information necessary for the committee members to review and make all necessary recommendations for the Program and Apprentices.

Committee Meetings

The LRC is required at a minimum to confer quarterly and provide an annual review of the Program. The meetings and other requirements are addressed in the Committee Charter.

Responsibilities

- Develop appropriate Charter
- Apprentice assessment review, AP review, and overall approval
- Program direction and scheduling review and oversight
- Evaluation and assessment of Program, and other team members
- Communication and Coordination with all management levels

Decision Making Authority

- Review and Approval of schedule, coordination, and overall assignment
- Adherence to necessary budget requirements
- Assessment and assessment of Program, Apprentice, and team members
- Reporting functionality to the JATC
- Recommendations for Program improvement(s)

Documentation

Refer to the Table - ATSO Training Program Requirements Matrix

ATTACHMENT 1

TRANSMISSION SYSTEM OPERATIONS Notification of Training Assignment

IBEW Union Business Representative: _____ Date: _____
Signature _____

Employee Name(s)	Phase in Apprenticeship Program	Current Headquarters	Current Work Days/Hours
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PROPOSED

Temporary Location: _____

Work days/Work Hours: _____

Sending Supervisor: _____ LAN ID: _____ Company Phone No. _____

Signature _____ Date _____

Receiving Supervisor: _____ LAN ID: _____ Company Phone No. _____

Signature _____ Date _____

Training Assignment Start Date: _____

Training Assignment End Date: _____

IBEW Contract Sections 201, 203 and T300.

cc: IBEW Business Representative
Joint Apprenticeship Training Committee/Labor Relations
Transmission System Operations Supervisor

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