

TSQP: Fundamentals for On-The-Job Instructors and Evaluators Notebook

Course # 37341

LA-UR-26-22946



TRAINING STAFF

QUALIFICATION PROGRAM

Unit One

Unit Two

Unit Three

Resources

Introduction

This interactive notebook will guide you through this course. Here you will find the slide information, space for note taking, and activities.

If you have any questions regarding the functioning of this notebook, please don't hesitate to ask your instructor.

You can use the tabs along the side to jump between units. Press "ctrl click" to use the tabs and open links while in PowerPoint.

At the completion of this course, save the notebook as a PDF for your records: Go to File > Save as Adobe PDF. Save your notebook in a place where you can access it in the future to reference as needed.

Purpose

The purpose of this course is to provide instructors with the knowledge and skills required to deliver on-the-job trainings effectively and according to the standards and expectations of Los Alamos National Labs and the Department of Energy.



Unit One

Unit Two

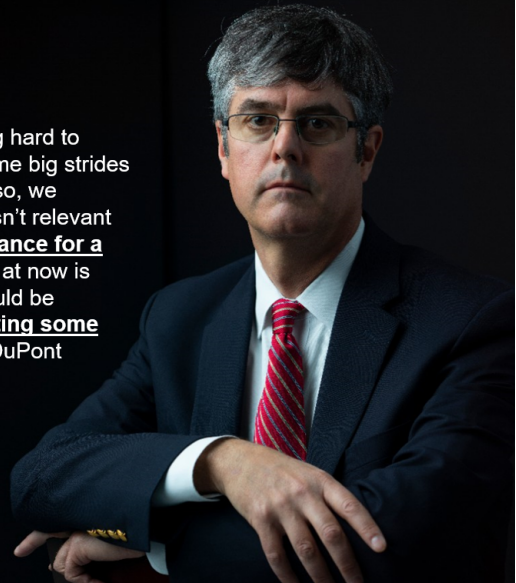
Unit Three

Resources

We need more job-specific, hands-on training.

Training is something the Laboratory has actively been working hard to streamline and enhance over the past couple of years, and some big strides have been made. Over the course of the past two decades or so, we overloaded our system with training which, in many cases, wasn't relevant to job duties or performance, or **didn't provide enough substance for a meaningful learning outcome**. What we're continuing to look at now is what training can be eliminated per job category and what should be redeveloped or **reimagined in a better way, including recasting some trainings as hands-on experiences**. I hope that by the next DuPont survey, we've put a big dent in this problem.

Thom Mason, Director's Blog, June 2024, "DuPont Safety Survey: initial impressions, what to know, what's coming next"



Notes:

Write your notes here

Overview of the Day

Our course today consists of:

- Introduction
- Unit One: OJT Overview
- Unit Two: Delivery and Instruction
- Unit Three: Evaluation and Documentation
- Conclusion



Unit One

Unit Two

Unit Three

Introductions

- Name
- Organization
- What was the best OJT you ever took? What made it so special?

Introduce your partner to the class by name, org, and the highlights of their amazing OJT experience.



Notes:
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Resources

Unit One: OJT Overview

Unit One: OJT Overview

After this unit, you will be able to:

Utilize the three sections of an OJT template to accurately and safely implement OJT instruction and evaluation.



Unit One

Unit Two

Unit Three

Resources

Notes:
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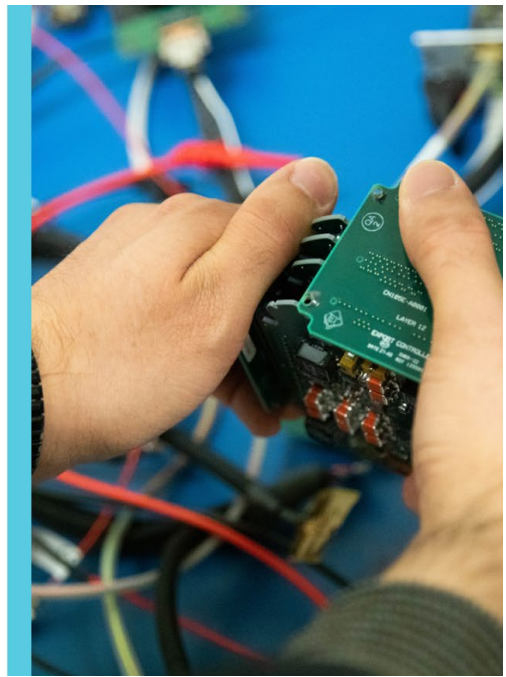
What is On-The-Job Training

OJT is simply training on the job. It is widely accepted that adults learn best by doing.

Let's look at some examples:

- A Roman engineer teaches his young apprentice how to construct the arch structure in an aqueduct.
- A Renaissance blacksmith teaches his children how to heat and hammer steel into other tools.
- A WWII riveter learns the skills of cutting, placing and joining parts to make the wing of an aircraft.
- A waste management coordinator uses OJT to teach a co-worker how to use the waste compliance and tracking system. The coordinator then uses a performance checklist to evaluate the co-worker's knowledge and skill level.

"Poor is the pupil who does not surpass their master."
- Leonardo Davinci



Why Use OJT?

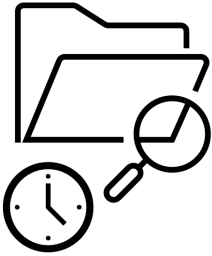
On-the-job training, also referred to as Activity Level Training, trains individuals in how the skill is **actually** performed on the job. This training method is successful because:

- Training is derived from the work environment using job data.
- Instructional objectives are defined by statements of observable, measurable outcomes.
- The trainee's entry-level skills and knowledge are considered when creating the training.
- Learning is tailored to the specific role and organization.
- Instructional content is sequenced in a hierarchical fashion to move the trainee from general to specific knowledge and skills.
- Instructional methods are considered as important as the content.

Notes:

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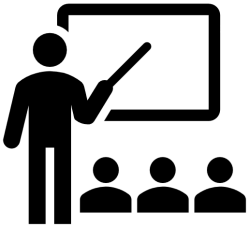
Overview: The OJT Process:



Preparation

- Schedule the Training
- Prepare materials
- Prepare the training setting

Overview: The OJT Process:



Deliver the Training

- Establish Psychological Safety
- Foster Curiosity
- Instruct
 - Explain/Demonstrate (*I do*) → Practice (*We do*)
- Administer Performance Demo /Evaluation (*You do*):
 - Perform → Simulate → Observe → Discuss

Notes:

Write your notes here

Overview: The OJT Process:



Documentation and follow up

- Document the completed training
- Store and maintain records appropriately
- Provide any additional support to trainees (as applicable)



Preparation: Lesson Plans

- Ensure training is formalized, standardized, documented, and consistently implemented.
- Are developed by qualified Learning Specialists, Subject Matter Experts, and On-the-Job Training professionals to ensure trainings are appropriate and technically accurate.
- Functions as the primary tool to guide the training process.
- NOTE: As an OJT instructor it will be your responsibility to be fluent in the lesson plans you teach, to know how to access the documents, and to know that the documents you use are the most current versions.

Notes:

Write your notes here

OJT Template

Section 1: OJT Instructor Guide

- Instructor and Evaluator Qualifications
- OJT Instruction Checklist
- OJT Lesson Plan

Introduction

- Introduce yourself. Identify today's training schedule (including breaks), safety and security-related information, and location of restrooms. Set trainees at ease.
- Does everyone have his or her OJT Trainee Guide? Refer to the "Task Performance Steps" section in your Guide. Today we will be learning these tasks. Read the tasks out loud (no steps). In addition, we will go over the safety and knowledge questions. Does everyone see where these are? What equipment, PPE, etc., do you need for this training? Let trainees find this information. Ensure that trainees have the items in the "PPE, Equipment, and Training Aids" section with them for the training.
- Ask any and all questions that you have. I will provide coaching. If you feel you need more coaching – or you want to look up information in any procedures or reference material—please let me know.
- Before we get started, I need to understand what your previous knowledge and experiences are in relation to the task(s) we are learning today. Ask trainees questions and keep them talking until you understand the level of your trainees' needs. Remember to solicit the information they may know from them as you train. They may also be able to help each other with what they know (ensure it is correct).
- Why might this training be helpful to you? Listen to their responses. **[Supplement with other possible motivations here.]**
- Do you have any questions before we begin the actual training?

Body

- Ask trainees to turn to the page in their OJT Trainee Guide that lists the objectives. Review each objective to ensure understanding.
- Verify that trainees have read and reviewed safety and knowledge questions and issues (including Safety Basis, TSR, and/or DSA questions, if applicable). Ask trainees an assortment of questions now and throughout training to check their understanding. Ask all required questions during the training.
- Provide "what if" scenarios to cover safety/emergency situations and trainee responses. **[Write scenarios here.]**
- Identify at least one lesson learned that is relevant or similar to the OJT, review it with the trainees. **[Write relevant lessons learned here.]**
- Describe how you will conduct the performance training (demonstrate doing the task, have trainees practice the task while you coach them, watch and question them to ensure proper performance).
- Conduct task performance training. Remember that trainees may be visual, auditory, or kinesthetic learners, so adjust your demonstration and coaching style to meet their needs. Throughout this process, also remember to provide constructive feedback. Continue training until the trainee determines that he/she has learned the performance task.
- What questions do you have about what you are expected to know or do?

Conclusion

- Ask trainees to answer the safety, knowledge, and task performance questions; remediate incorrect answers.
- Re-read each objective and ask trainees to supply what they have learned to satisfy that objective. Ask if they need more to satisfy it.
- If necessary, demonstrate task(s) again and allow trainees further practice.
- Review evaluation criteria with trainees.
- Inform the trainee whom to contact when they are ready to be evaluated.
- Praise trainee for successfully completing training, encourage him/her to focus on weaker areas, and motivate further.
- After a trainee successfully completes training, fill out the instructor's signature block in your copy of the OJT Trainee Guide. Give your copy of the OJT Trainee Guide to the evaluator for signoff on the evaluation portion of the training.
- Ask trainees to complete the attached OJT Course Evaluation.
- Maintain completed evaluations in the trainee's training file.

Links: [Policy and Forms](#)

Notes:

Write your notes here

Section 1: OJT Instructor Guide

This *OJT Instructor Guide* provides all the information you need in order to understand the following:

- OJT Instructor and Evaluator Qualifications
- OJT Instruction Checklist
- OJT Lesson Plan

OJT Instructor and Evaluator Qualifications

1. OJT instructors and evaluators must meet the following criteria:
 - Be an SME in the tasks to be trained or evaluated
 - Qualified on those tasks
 - Completed TSQP: OJT Instructor/Evaluator training requirements (Curriculum 411: TSQP – OJT Instructor/Evaluator)
2. SMEs cannot develop OJT instructional material unless they meet one of the two requirements below:
 - They have completed the appropriate instructional TSQP development courses (Curriculum: 409 – TSQP Training Specialist [nonnuclear facility] or 10484: TSQP – Training Specialist [nuclear facility]) or
 - A qualified training specialist, training manager, or organizational representative reviews and approves the lesson plan.
3. An OJT instructor/evaluator is limited to training/evaluating no more than three trainees at a time. To exceed the limit for the trainee-to-instructor ratio, the responsible line manager, or designee, with advice from the instructor and operations workers, approves an appropriate ratio and documents the ratio in the [OJT Lesson Plan](#) or in a separate memorandum for special circumstances.

NOTE: Candidates for certification in nuclear facilities must receive one-on-one OJT instruction.

OJT Instruction Checklist

- Replace information that is printed inside **[bold brackets]**, including the header and titles, for all three guides.
- Complete an *OJT Lesson Plan* (in the next section).
- Develop an *OJT Trainee Guide*.
 - Develop training in accordance with Integrated Safety Management Systems (ISMS) as well as appropriate procedures and related documents.
 - When you have a critical or safety-related performance task step, you must write “(Critical)” or “(Safety)” next to the step. **Example: Step 3: (Critical) Light the boiler.**
A critical step in a performance demonstration, if incorrectly performed or performed in the wrong order, may
 - cause personnel injury or a safety issue
 - result in equipment or product damage or have a technical safety requirement (TSR) impact
 - require significant recovery time
 - If steps implement Safety Basis, TSRs, and/or Documented Safety Analysis (DSA), you must write your facility’s designation for those requirements next to the step (e.g., some facilities use the (\$) symbol). Steps containing your facility’s symbol may not be changed without approval; this ensures that the safety envelope is maintained.
- Ask your training coordinator/training administrator to obtain an *UTrain* item or curriculum number for this OJT.
- Make two copies of the completed *OJT Trainee Guide*. (You will give the trainee one copy and retain the second copy for instructor and evaluator signoffs.)
- Tell the trainee to contact an instructor to arrange training, **after** studying the contents of the *OJT Trainee Guide*.
- Prior to training, ensure that each participant has completed all prerequisites (in the *OJT Trainee Guide*) and is personally ready for this training.
- Prior to training, at the Plan-of-the-Day (POTD) meeting (if applicable), list and get approval for all facility training activities.
- Instruct the trainee in accordance with the *OJT Lesson Plan*.
- When training is complete, sign your copy of the *OJT Trainee Guide* and give it to the evaluator.
- When the trainee indicates that he/she is ready to be evaluated, arrange time with an evaluator and the trainee.
Note: it is highly preferable for the instructor and evaluator to be different people.

Links: [Policy and Forms](#)

Notes:

Write your notes here

OJT Lesson Plan

The lesson plan itself is divided into three training sections: introduction, body, and conclusion. Ensure that you cover all material in the order indicated, and remember to review and apply the training techniques that you learned during your TSQP instruction. During training, you can say the italicized wording *verbatim* or use similar wording that is more natural to you. In addition, remember to provide information for items that are **[bold and inside brackets]**.

Introduction

- Introduce yourself. Identify today's training schedule (including breaks), safety and security-related information, and location of restrooms. Set trainees at ease.
- Does everyone have his or her OJT Trainee Guide? Refer to the "Task Performance Steps" section in your Guide. Today we will be learning these tasks. Read the tasks out loud (no steps). In addition, we will go over the safety and knowledge questions. Does everyone see where these are? What equipment, PPE, etc., do you need for this training? Let trainees find this information. Ensure that trainees have the items in the "PPE, Equipment, and Training Aids" section with them for the training.*
- Ask any and all questions that you have. I will provide coaching. If you feel you need more coaching – or you want to look up information in any procedures or reference material—please let me know.*
- Before we get started, I need to understand what your previous knowledge and experiences are in relation to the task(s) we are learning today.* Ask trainees questions and keep them talking until you understand the level of your trainees' needs. Remember to solicit the information they may know from them as you train. They may also be able to help each other with what they know (ensure it is correct).
- Why might this training be helpful to you?* Listen to their responses. **[Supplement with other possible motivations here.]**
- Do you have any questions before we begin the actual training?*

Body

- Ask trainees to turn to the page in their *OJT Trainee Guide* that lists the objectives. Review each objective to ensure understanding.
- Verify that trainees have read and reviewed safety and knowledge questions and issues (including Safety Basis, TSR, and/or DSA questions, if applicable). Ask trainees an assortment of questions now and throughout training to check their understanding. Ask all required questions during the training.
- Provide "what if" scenarios to cover safety/emergency situations and trainee responses. **[Write scenarios here.]**
- Identify at least one lesson learned that is relevant or similar to the OJT; review it with the trainees. **[Write relevant lessons learned here.]**
- Describe how you will conduct the performance training (demonstrate doing the task, have trainees practice the task while you coach them, watch and question them to ensure proper performance).
- Conduct task performance training. Remember that trainees may be visual, auditory, or kinesthetic learners, so adjust your demonstration and coaching style to meet their needs. Throughout this process, also remember to provide constructive feedback. Continue training until the trainee determines that he/she has learned the performance task.
- What questions do you have about what you are expected to know or do?*

Conclusion

- Ask trainees to answer the safety, knowledge, and task performance questions; remediate incorrect answers.
- Re-read each objective and ask trainees to supply what they have learned to satisfy that objective. Ask if they need more to satisfy it.
- If necessary, demonstrate task(s) again and allow trainees further practice.
- Review evaluation criteria with trainees.
- Inform the trainee whom to contact when they are ready to be evaluated.
- Praise trainee for successfully completing training, encourage him/her to focus on weaker areas, and motivate further.
- After a trainee successfully completes training, fill out the instructor's signature block in your copy of the *OJT Trainee Guide*. Give your copy of the *OJT Trainee Guide* to the evaluator for signoff on the evaluation portion of the training.
- Ask trainees to complete the attached *OJT Course Evaluation*.
- Maintain completed evaluations in the trainee's training file.

Links: [Policy and Forms](#)

Notes:
Write your notes here

OJT Template

Section 2: OJT Trainee Guide

- Prerequisites
- The OJT Instruction and Evaluation Process
- Related Documents PPE, Equipment, and Training Aids
- Objectives Safety and Knowledge Questions and Answers
- Task Performance Steps

TASK PERFORMANCE STEPS		*SAT/UNSAT	
Task/Subtask [#]. Copy text here			
Step 1: [text here]	SAT	UNSAT	
Step 2: [text here]	SAT	UNSAT	
Step 3: [text here]	SAT	UNSAT	
Step 4: [text here]	SAT	UNSAT	
Add or delete tasks/subtasks and steps as needed	SAT	UNSAT	*Initial the result
TASK PERFORMANCE STEPS		*SAT/UNSAT	
Task/Subtask [#]. Copy text here			
Step 1: [text here]	SAT	UNSAT	
Step 2: [text here]	SAT	UNSAT	
Step 3: [text here]	SAT	UNSAT	
Step 4: [text here]	SAT	UNSAT	
Add or delete tasks/subtasks and steps as needed	SAT	UNSAT	*Initial the result

When the trainee completes the *Instructional* portion of this on-the-job training, both the instructor and the trainee must sign at the same time and date. When the trainee completes all *evaluation*, both the evaluator and the trainee must sign at the same time and date. (If more than one instructor or evaluator is involved, add names and signatures.)

Trainee Name (print)	Z#
Trainee Post-Instruction Signature	Date
Trainee Post-Evaluation Signature	Date
Instructor Name (print)	Z#
Instructor Signature	Date
Evaluator Name (print)	Z#
Evaluator Signature	Date

Links: [Policy and Forms](#)

Notes:
Write your notes here

Section 2: OJT Trainee Guide

This *OJT Trainee Guide* provides all the information you need in order to understand the following:

- Prerequisites
- The OJT Instruction and Evaluation Process
- Related Documents (questions and performances are based on these)
- PPE, Equipment, and Training Aids
- Objectives (what you will know or be able to do)
- Safety and Knowledge Questions and Answers (including Safety Basis, TSR, and/or DSA questions, if applicable)
- Task Performance Steps

Prerequisites

Prior to this training, you must have successfully completed the following training requirements: **[List prerequisites here]**

If you have **not** met these prerequisites, notify your supervisor, training coordinator, or training administrator, and complete the prerequisites.

The OJT Instruction and Evaluation Process

An instructor will provide you with an *OJT Trainee Guide* for each OJT lesson. Before starting your instruction, you must read the remainder of this *OJT Trainee Guide*. Write down any questions that you have and bring them to the OJT training session.

During the instruction process, the suggestions below will help you succeed in learning the material.

- Ask your instructor questions in order to understand what you need to learn. When in doubt, ask!
- Ask for coaching and repeated demonstrations at any time during your instruction.
- Bring your *OJT Trainee Guide* to training sessions and refer to performance steps, safety and knowledge questions, and other related information as often as you like.
- Practice all performance activities for as long as you need to, until you feel comfortable doing the tasks.
- Ensure that you know and understand all the safety and knowledge questions in your *OJT Trainee Guide*. You will be asked these questions **verbatim** during your evaluation.

NOTE

YOU MUST ANSWER ALL SAFETY-RELATED QUESTIONS WITH 100% ACCURACY.

During your evaluation, the following rules apply:

- You may use your reference materials (such as procedures) during the evaluation, but you may **not** use your *OJT Trainee Guide*.
- The evaluator cannot answer any questions or coach you.
- Perform each task in accordance with the appropriate training/reference materials.
- In the event any problems arise beyond your knowledge and skills, step back and allow the evaluator to take control.
- Your performance criteria are as follows:
 - Failing to respond correctly to a safety-related question (including Safety Basis, Technical Safety Requirement [TSR], and/or Documented Safety Analysis [DSA] questions, if applicable) is an automatic failure of this evaluation. Safety questions require 100% accuracy.
 - You must successfully respond to all knowledge questions 80% or better.
 - Incorrectly **performing** any critical step or two (2) non-critical steps constitutes a failure of this evaluation. A **critical step** in a performance demonstration is defined as a step that, if incorrectly performed or performed in the wrong order, may cause the following: personnel injury or a safety issue; equipment damage or cause a TSR and/or; significant recovery time.
- The OJT evaluator **must** record any error serious enough to warrant discontinuing the training session or a failure of a task/subtask evaluation.

Links: [Policy and Forms](#)

Notes:

Write your notes here

RELATED DOCUMENTS

The documents below provide the basis for all knowledge and safety questions, as well as performance of tasks.

- [Document 1]
- [Document 2]
- [Document 3]

PPE, EQUIPMENT, TRAINING AIDS

Bring the following to your training sessions:

- [List PPE]
- [List equipment]
- [List training aids]

OBJECTIVES AND THEIR (SOURCES)

At the end of this training, you will know and be able to perform the following:

1. Answer safety questions correctly 100%, including Safety Basis, TSR, and/or DSA questions, if applicable (10°CFR°830).
2. Answer knowledge questions correctly with 80% accuracy or better.
3. [Instructor lists further specific performance objectives.]

SAFETY QUESTIONS	*SAT/UNSAT	
1. [Question] [Acceptable Response]	SAT	UNSAT
2. [Question] [Acceptable Response]	SAT	UNSAT
3. [Question] [Acceptable Response]	SAT	UNSAT
4. [Question] [Acceptable Response]	SAT	UNSAT
5. [Question] [Acceptable Response]	SAT	UNSAT
Add or delete questions and acceptable responses as needed.	*Initial the result.	

KNOWLEDGE QUESTIONS	*SAT/UNSAT	
1. [Question] [Acceptable Response]	SAT	UNSAT
2. [Question] [Acceptable Response]	SAT	UNSAT
3. [Question] [Acceptable Response]	SAT	UNSAT
4. [Question] [Acceptable Response]	SAT	UNSAT
5. [Question] [Acceptable Response]	SAT	UNSAT
Add or delete questions and acceptable responses as needed.	*Initial the result.	

Links: [Policy and Forms](#)

Notes:
Write your notes here

CAUTION

DO NOT ALLOW THE TRAINEE TO MAKE AN ERROR THAT WOULD PUT PERSONNEL, EQUIPMENT, THE ENVIRONMENT, SECURITY, OR THE FACILITY IN JEOPARDY AT ANY TIME DURING THIS EVALUATION.

TASK PERFORMANCE STEPS	*SAT/UNSAT	
Task/Subtask [#: Copy text here.]		
Step 1: [Text here]		
	SAT	UNSAT
Step 2: [Text here]		
	SAT	UNSAT
Step 3: [Text here]		
	SAT	UNSAT
Step 4: [Text here]		
	SAT	UNSAT
Add or delete tasks/subtasks and steps as needed.	*Initial the result.	

TASK PERFORMANCE STEPS	*SAT/UNSAT	
Task/Subtask [#: Copy text here.]		
Step 1: [Text here]		
	SAT	UNSAT
Step 2: [Text here]		
	SAT	UNSAT
Step 3: [Text here]		
	SAT	UNSAT
Step 4: [Text here]		
	SAT	UNSAT
Add or delete tasks/subtasks and steps as needed.	*Initial the result.	

When the trainee completes the **instructional** portion of this on-the-job training, both the instructor and the trainee must sign at the same time and date. When the trainee completes all **evaluation**, both the evaluator and the trainee must sign at the same time and date. (If more than one instructor or evaluator is involved, add names and signatures.)

Trainee Name (print)	Z#
Trainee Post-Instruction Signature	Date
Trainee Post-Evaluation Signature	Date
Instructor Name (print)	Z#
Instructor Signature	Date
Evaluator Name (print)	Z#
Evaluator Signature	Date

Links: [Policy and Forms](#)

Notes:

Write your notes here

Section 3: OJT Evaluator Guide

This *OJT Evaluator Guide* provides all the information you need in order to understand the following:

- Instructions to the OJT Evaluator
- Evaluation criteria
- *Unsatisfactory OJT Evaluation with Remediation Steps* form

Instructions to the OJT Evaluator

CAUTION

DO NOT ALLOW TRAINEE TO MAKE AN ERROR THAT WOULD PUT PERSONNEL, EQUIPMENT, THE ENVIRONMENT, OR THE FACILITY IN JEOPARDY AT ANY TIME DURING THIS EVALUATION.

- Review evaluation rules with the trainee, and ask if there are any questions before beginning the evaluation.
- During the evaluation do not allow the worker to ask questions; do not coach the worker in any way. The worker may consult reference materials (**except** the *OJT Trainee Guide*) at any time during the performance evaluation but may not ask you to clarify on any task or item.

NOTE

The evaluator may require the trainee to talk through a performance step before performing it. The evaluator must take care not to agree or disagree with the trainee's statements; this would be coaching. However, an exact repeat-back is not coaching.

- During the performance evaluation, ask safety and knowledge questions (including Safety Basis, TSR, and/or DSA questions, if applicable) **verbatim**. Evaluate only knowledge and safety questions, as well as performance steps, that are included in the *OJT Trainee Guide*.
- As a trainee responds/performs acceptably to a question or performance task, write your initials in the "SAT" column and date it. When every item is a "SAT," submit the completed copy to your training coordinator or training administrator.
- If a trainee fails to answer safety/knowledge questions or performs tasks/subtasks improperly, write your initials in the "UNSAT" column and date it. For all failures, you must complete the *Unsatisfactory OJT Evaluation with Remediation Steps* form (the last page) and submit it to the instructor(s) as well as to your training coordinator or training administrator for recordkeeping purposes.

Evaluation Criteria

Evaluate the trainee using the criteria below.

- If a trainee responds incorrectly to a safety-related question it is an automatic failure of this evaluation. Safety questions require 100% accuracy (including Safety Basis, TSR, and/or DSA questions, if applicable).
- The trainee must successfully respond to all knowledge questions with 80% or better accuracy.
- Incorrectly **performing** one (1) critical step or two (2) non-critical steps constitutes a failure of this evaluation. A **critical step** in a performance demonstration is defined as a step that, if incorrectly performed or performed in the wrong order, may cause the following: personnel injury or a safety issue; equipment damage or cause a Technical Safety Requirement/Review (TSR), and/or; significant recovery time.

Links: [Policy and Forms](#)

Notes:

Write your notes here

Trainee Evaluation of OJT Instruction and Evaluation

Please take the time to complete the following course evaluation after you have completed the OJT performance evaluation. Your feedback is important to assist us with the effectiveness of this course.

Course #		Title:
Instructor		
Date		

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. This OJT was a good use of my time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. This OJT will enable me to perform this task safely and correctly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The learning objectives found in this OJT were appropriate to the task being trained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The performance evaluation portion of this OJT was effective at measuring how much I learned during the instructional portion of the OJT.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Rate your level of knowledge:	Low		High		
Before the OJT instruction and evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
After the OJT instruction and evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you marked "Disagree" or "Strongly Disagree" to any of the above, please let us know why (in detail):

What changes would you recommend to make to this OJT course more effective?

Links: [Policy and Forms](#)

Notes:
Write your notes here

OJT Checklist for Success



Preparation:

Preparation is essential for OJT to be efficient and effective as possible. The trainer should follow the OJT Lesson Plan to ensure all preparation activities are completed.

Are you qualified to conduct OJT?

- Have you reviewed the Instructor Guide of the OJT Lesson Plan?
- Have you practiced the task or activity you will be teaching?
- Have you ensured that the trainee has completed all prerequisites?
- Have you notified all facility and operations management of the scheduled OJT session?
- Are facilities, equipment, safety equipment, procedures, signage (if applicable), and training materials ready to use for training?

Delivering the Training:

While instructing, the trainer should concentrate on the training environment to ensure the trainee is provided with a safe and positive learning environment. It is important that the trainer clearly explains and accurately demonstrates the activity. It is also important that the trainee has sufficient time to practice the training.

There are three sub-steps specific to the instruct step.

Sub-step 1: Explain

Sub-step 2: Demonstrate

Sub-step 3: Practice

- Have you introduced the training and established the ground rules for how the training will be conducted?
- Have you provided a brief overview to what the trainee is expected to learn?
- Have you differentiated between the critical and non-critical steps of the training?
- Have you thoroughly explained the tasks (or steps)?
- Have you demonstrated the tasks exactly the way the trainee is expected to perform them?
- Have you provided additional clarification and demonstration if needed?
- Has the trainee had sufficient time to practice under supervision?
- Are you confident with the knowledge and skill level of the trainee?

Post Training:

Post-training activities include providing feedback to the trainee prior to formal evaluation and documenting the training stage. Successfully wrapping up the activity ensures a positive training experience for the trainee. This motivation can be critical to his/her success during the evaluation.

- Have you completed a final review of the instructional objectives and the tasks?
- Have you provided any additional tips or recommendations that might help the trainee be better prepared for the evaluation?
- Have you documented completion of the training?
- Have you asked for feedback from the trainee regarding the effectiveness of the training experience?

OJT Lesson Plan Example

Section 1: OJT Instructor Guide
RCT: Operation of the Eberline RO-20 Ion Chamber

05/15/2024
OJT #43122
Page 2 of 4

Revision Log

Rev. No.	Date	Description of Change
0.0	10/30/2018	Initial release
1.0	2/20/2020	Removed survey requirement
2.0	11/29/2021	Revised to incorporate recent procedure changes for RP-PROG-TP-200. Modified learning objectives.
3.0	3/8/2022	Revised OJT templates to improve LP information and updated procedural revisions
4.0	05/15/2024	Revised OJT reference to procedure and edited procedural revisions

Section 1: OJT Instructor Guide

This *OJT Instructor Guide* provides all the information you need in order to understand the following:

- OJT Instructor and Evaluator Qualifications
- OJT Instruction Checklist
- OJT Lesson Plan

OJT Instructor and Evaluator Qualifications

1. OJT instructors and evaluators must meet the following criteria:
 - Completed TSQP: OJT Instructor/Evaluator training requirements (Curriculum 411: TSQP—OJT Instructor/Evaluator)
2. SMEs cannot develop OJT instructional material unless they meet one of the two requirements below:
 - They have completed the appropriate instructional TSQP development courses (Curriculum: 409—TSQP Training Specialist [nonnuclear facility] or 10484: TSQP—Training Specialist [nuclear facility]) or
 - A qualified training specialist, training manager, or organizational representative reviews and approves the lesson plan.
3. An OJT instructor/evaluator is limited to training/evaluating no more than three trainees at a time. To exceed the limit for the trainee-to-instructor ratio, the responsible line manager, or designee, with advice from the instructor and operations workers, approves an appropriate ratio and documents the ratio in the *OJT Lesson Plan* or in a separate memorandum for special circumstances.

Note: *Candidates for certification in nuclear facilities must receive one-on-one OJT instruction with the exception of a student to instructor ratio of up to a 12 to 1 as set forth in RP memorandum RP-18-028.*

Links: [Policy and Forms](#)

Notes:

Write your notes here

OJT Lesson Plan

The lesson plan itself is divided into three training sections: introduction, body, and conclusion. Ensure that you cover all material in the order indicated, and remember to review and apply the training techniques that you learned during your TSQP instruction. During training, you can say the italicized wording *verbatim* or use similar wording that is more natural to you. In addition, remember to provide information for items that are **[bold and inside brackets]**.

Introduction

- Brief Building Emergency Plan
- Provide an overview for the OJT instruction and evaluation process – **Prepare** (review of applicable procedures), **Practice** (Instructor guided practice and demonstrations), and **Present** (independent OJT evaluations)
- Ensure students have copies of the following materials:
 - a. RP-PROG-TP-300, Thermo/Eberline RO-20
 - b. RP-PROG-FORM-110, Exposure Rate Instrument Performance Test Log
 - c. RP-PROG-FORM-041, Instrument Check Tag

Body

- **Procedure Review** – RP-PROG-TP-300 and the RP-PROG-FORM-110. Review with students and ensure the following topics are emphasized:
 - a. Operational Characteristics of RO-20 (RP-PROG-TP-300, Sections 1.1, 4.1, and 9.0)
 - Types of radiation detected – Beta, Gamma, and X-ray
 - Range of detector – 0-50 R/hr with 5 linear scales: 0-5mR/hr, 0-50mR/hr, 0-500mR/hr, 0-5R/hr, and 0-50R/hr
 - Type of detector – Vented ion chamber
 - Altitude dependence (attachment A)
 - Response to various energies (Appendix 1)
 - b. Field Maintenance (RP-PROG-TP-300, Section 4.2)
 - Types of batteries in use – 12V and AA
 - 12V batteries can only be changed by RIC personnel
 - c. Operational Checks of RO-20 (RP-PROG-TP-300, Sections 4.4 - 4.7 and RP-PROG-FORM-110)
 - Explain differences between performance tests and routine response checks
 - Establishing reference readings – When is this required?
 - Field Operational Checks – when is this required?

Links: [Policy and Forms](#)

Notes:

Write your notes here

- **OJT Task Demonstration**

- Demonstrate all required performance steps
- Perform AA Battery Replacement
- Quiz students on knowledge questions
- Utilize a LANL Sr-90 gold source box, DU slugs or simulated sources to perform all measurements for Reference Readings and Response Checks and complete RP-PROG-FORM-110
- **SAFETY: Anti-contamination gloves must be worn when handling radioactive sources**

Conclusion

- Review learning objectives with students
- Summarize key concepts and required steps for OJT evaluation
- **Ask trainees to complete the attached *OJT Course Evaluation* (Section 4).**
- Following the completion of OJT evaluation ensure copies are stored in the student's electronic and physical personnel files.

Links: [Policy and Forms](#)

Notes:

Write your notes here

Our Story Begins



Unit One

Unit Two

Unit Three

Resources

Notes:
Write your notes here

Discussion



Let's take a moment to discuss the video we just watched.

In small groups, please discuss some of the following questions:

- Why do you think Fred was selected to be the instructor for the drill press?
- Did watching that video remind you of any OJTs from your experiences? What similarities stand out to you? Were any best/worst memories triggered?
- How do you think Mary feels about her new job?

Type Take-Aways Here

Caution:
**Subject Matter
Experts Are in the
Vicinity!**

At LANL, most On-the-Job Trainers are Subject Matter Experts (SMEs) for the trainings they deliver.

This can be a great advantage.

This can also be a great challenge.



Notes:
Write your notes here

Unit One

Unit Two: Delivery and Instruction

Unit Two

Unit Three

Resources



Unit Two: Delivery and Instruction

After this unit, you will be able to:

- Utilize the adult learning theory, principles and learner personas to instruct trainees.
- Utilize appropriate instructional methods and practices to instruct trainees, provide support, and close learning gaps.
- Guide and support trainee practice by ensuring trainees perform the skill with increasing accuracy and confidence.
- Determine trainee readiness for evaluation by observing performance and identifying skill mastery.

Notes:

Write your notes here

Activity



Use a piece of paper from the supplies on your table and answer the following questions:

What motivates you to learn new things professionally?

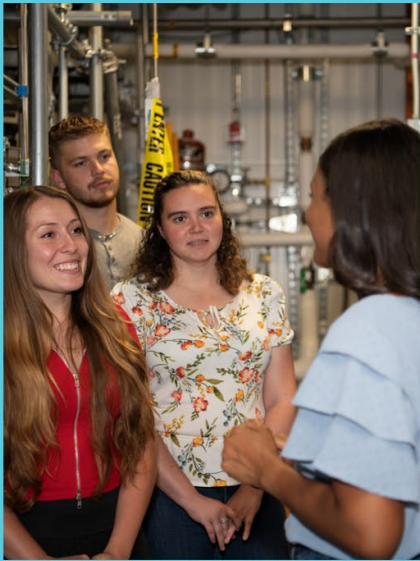
How does your engagement with learning connect with your temperament, personality, stage of life, etc.? *Meaning, what unique things about you impact how you learn best?*

Type Take-Aways Here

The Adult Learning Theory

Learning Principles

Learner Personas



Andragogy

Andragogy is the art and science of helping adults learn.

Unlike children, adults bring life experience, existing knowledge, and specific goals to the learning environment.

Understanding how adults learn best helps trainers create more effective and engaging training experiences.

Adult learning is based on key principles, when applied can make learning more meaningful, efficient and impactful.

Notes:

Write your notes here

Five Principles of Adult Learners (Knowles)

1. Self-Direction

2. Experience

3. Relevance/Practicality

4. Goal Oriented

5. Internal Motivation



Unit One

Unit Two

Five Principles of Adult Learners

1. Self-Direction

2. Experience

3. Relevance/Practicality

4. Goal Oriented

5. Internal Motivation

As people mature, their self-concept moves from one of being a dependent personality toward one of being a self-directed human being.



Unit Three

Notes:

Write your notes here

Resources

Five Principles of Adult Learners

1. Self-Direction

As we mature, we accumulate a growing reservoir of experience that becomes an increasing source for learning.

2. Experience

Adults learn best by doing. Practice and practical application of knowledge is crucial to cement learning.

3. Relevance/Practicality



4. Goal Oriented

5. Internal Motivation

Five Principles of Adult Learners

1. Self-Direction

As we mature, our readiness to learn becomes oriented increasingly to the developmental tasks of our social roles. Adults are generally motivated to learn what they feel they need to know to be successful in their roles.

2. Experience

3. Relevance/Practicality



4. Goal Oriented

5. Internal Motivation

Notes:
Write your notes here

Unit One

Unit Two

Unit Three

Resources

Five Principles of Adult Learners

1. Self-Direction

2. Experience

3. Relevance/Practicality

4. Goal Oriented

5. Internal Motivation

As people mature, their perspective of time changes from postponed applications of knowledge to immediacy of application; Their orientation toward learning shifts from subject-centeredness to one of problem centeredness.



Unit One

Unit Two

Five Principles of Adult Learners

1. Self-Direction

2. Experience

3. Relevance/Practicality

4. Goal Oriented

5. Internal Motivation

As people mature, the motivation to learn is internal.



Unit Three

Notes:

Write your notes here

Resources

Adult Learning Principles in OJT

1. Establish Relevance immediately
2. Encourage active participation
3. Facilitate self-directed learning (metacognition)
4. Use real-world problem solving
5. Immediate feedback
6. Create a supportive environment



Adult Learner Types: How to Manage Different Personas in the Training Setting

<p>The “Just Tell Me What I Need to Know” Learners</p> <p>Prefer a list and a quick run-through.</p> <p>On a schedule</p> <p>Not interested in stories.</p>	<p>The “I Need to Solve a Problem” Learners</p> <p>Highly motivated.</p> <p>Learn by trial-and-error.</p>	<p>The “Ooh, Shiny!!” Learners</p> <p>Short, distributed attention.</p> <p>Think they multitask, but really just switch task focus a lot.</p>	<p>The “Hey! This is Cool!” Learners</p> <p>Bring a lot of motivation to the table.</p> <p>Curious</p> <p>Very interested in stories.</p>	<p>The “This Is a Required Course” Learners</p> <p>May need to be convinced that the material is useful.</p> <p>Motivated by completion.</p>	<p>The “I Fear Change” Learners</p> <p>Need to be convinced that the change will be doable and useful.</p> <p>Need time to acclimate and safe opportunities to practice.</p>	<p>The “I Already Know This” Learners</p> <p>Don't want to sit through the beginner material.</p> <p>Don't need the whole backstory.</p> <p>Understand quickly and get a lot of subtleties.</p>
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Notes:

Write your notes here

Discussion



In your small group, discuss how you best learn and determine which **adult learning principle** AND/OR **persona** is most active in you.

- How have you noticed this in your own learning journey?
- Did this learning principle connect with your OJT memory from the introduction activity?
- What are the strategies/activities/practices you can use in an OJT lesson to activate the adult learning principle that resonates most with you?

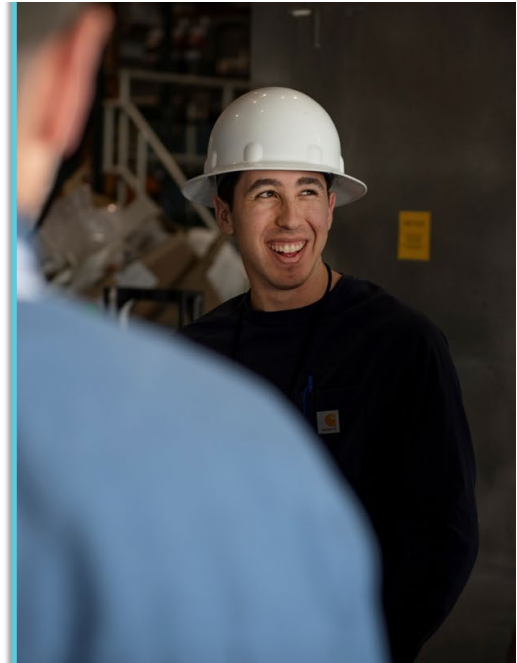
Summarize your thoughts on one piece of paper for your group.

Type Take-Aways Here

Instructional Methods and Practices

How does an OJT Instructor Create and Maintain a Positive Training Environment?

- Set expectations
- Establish trust and psychological safety
- Explain *why* the training content is important
- Leverage effective questioning techniques
- Demonstrate effective time management



Notes:
Write your notes here

Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Set Clear Expectations

People feel safer, or are more at ease, when they know what is expected of them. Your role as Instructor is to create transparency and establish clear expectations for the behavior and interaction of the training participants.

Questions to consider:

- Do you expect trainees to listen actively and ask questions?
- What are the ground rules for the training?
- How will the training will be conducted?
- How are trainees expected to participate?
- What should trainees expect when it comes to feedback?
- How will you stop them for moments of clarification, redirection, or safety?

To maintain a safe and positive environment, it is important you:

- Review and reinforce the expectations as necessary
- Address any issues directly, kindly, and promptly
- Empower trainees to uphold the expectations

Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Establish Trust and Psychological Safety

As a first step, it is important to connect with your trainees. Leverage icebreakers or introductions to:

- Role model psychological safety
- Learn trainee's names
- Learn something unique about them
- Build connection with individuals / share your story and lessons learned
- Manage communication dynamics



Notes:

Write your notes here

Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Explain *why* the training content is important

When learners understand *why* they're learning something, they're more likely to pay attention, stay engaged, and retain the information.

- Builds judgment and problem-solving
- Connects the training to broader goals
- Gives the learning context and meaning
- Directly supports adult learning principles



Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Leverage Effective Questioning Techniques

Let's discuss some types of questions that motivate a positive learning experience.

- Open-ended, or probing questions: help discover unanticipated answers and important insights
- Clarifying questions

Clarifying Questions

Clarifying questions are questions that are designed to eliminate or prevent any misunderstanding, confusion, or ambiguity. They enable the trainee to ensure they properly understand.

Examples:

- Can you explain what you mean by that?
- Could you provide more information regarding ...?
- Can you give an example of how this would work...?

Open-ended, Probing Question Examples:

- Can you provide more details about?
- What are the potential risks regarding ...?
- What are some of the benefits of ...?
- Can you tell me more about ...?

Open-ended, Probing Questions

Open-ended questions often start with:

- Why?
- How?
- What?

They encourage people to think and share thoughts and ideas in greater depth. Open-ended, probing question generally invite more than just a "yes" or "no" answer.

Notes:

Write your notes here

Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Leverage Effective Questioning Techniques

A Word About Waiting and Silence:

Silence in the training environment can make us uncomfortable- and- processing information can take time.

How much time do you think one should allow for after asking a question?

- a) 0-2 seconds
- b) 3-5 seconds
- c) 6-10 seconds



Set expectations and establish class norms

Establish trust and psychological safety

Explain why the content is important

Leverage effective questioning techniques

Demonstrate effective time management

Time Management

Effective instructors have a keenly-developed sense of timing. They are committed to staying on track and to keeping well-established boundaries on the training and activities.

- Review Lesson Plan and Activities.
 - Practice delivering the training and time yourself (at least mentally frame it).
 - Include in your notes time limits for each section of the training.
 - Remember to pause and give trainees time to process and soak in experience – ***The three times rule.***
 - Leave a few minutes for flexibility, more if it is a particularly complex training or procedure.
- Monitor your time during training.
 - If one activity or part of a training takes longer than expected, adjust other activities- as possible- to accommodate the change without compromising the content of the training.



Notes:

Write your notes here

Always Room for Improvement

As we watch the continuation of the story, take note of Fred's improved practices.

Discuss:

Notable improvements?



Unit One

Unit Two

Unit Three

Resources

Notes:

Write your notes here

Providing Support and Closing Learning Gaps

How to adapt training to learner needs and close the learning gap

Effective trainers adapt their training styles to the individual differences and capabilities of their trainees.

- Know your audience.
- Build on the knowledge that already exists among the learners.
- Know how to read the trainee.
- Know the training content.

Summarizing helps focus learners' attention and reinforce learning.

- After each main section of the training, take the time to summarize what was covered, highlighting key aspects of the training. Have trainees summarize steps back to you.
- Tie back key points to the overall objectives, background knowledge and shared personal experiences with trainee.



Notes:

Write your notes here

How to adapt training to learner needs and close the learning gap

Ask yourself:

Does the individual or group tend to grasp concepts quickly? You may want to:

- Move more quickly through some content while ensuring you maintain quality and rigor.

Does the training setting involve unpleasant physical conditions? If a trainee will be exposed to extreme temperatures or high noise levels, you may want to:

- Minimize exposure to unpleasant conditions by using a mockup or simulator environment first.

Are there aspects of the content that are more difficult, complex, or confusing? You may want to:

- Slow down.
- Budget ample time for the trainee to process the training.
- Break complex tasks into manageable parts.
- Anticipate common areas of confusion.
- Take time to ask probing questions to check for understanding.
- Provide ample practice time



The Importance of Scaffolding Learning and the Zone of Proximal Development

What is Scaffolding?

Providing the support to enable the trainee to learn with the assistance of guidance or resources.

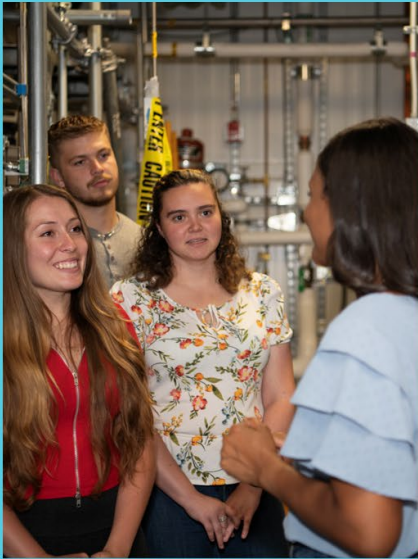
Zone of Proximal Development

The range where learning can be most effective, pushing the learner beyond their current capabilities but within reach with assistance.



Notes:

Write your notes here



How to Scaffold Learning

1. **I do** = Modeling

The trainer provides a model performance for the trainee to emulate. It is very important that the trainer presents the material in the proper sequence and follows all applicable procedures and safety requirements.

2. **We do** = Appropriate Practice, Fading & Coaching

Practice should be as similar to the actual job task as possible. Consider distributing practice over time to avoid fatigue.

3. **You do** = Prepare and Screen for Evaluation



What is Formative Assessment?

Formative assessment is regular, informal methods used to assess trainee understanding and guide the instructor training strategies.

The goal of formative assessment is to:

- collect information that can be used to improve instruction and trainee understanding- while it's happening- or in real time.

Types of Formative Assessment

- Observation and effective feedback during training activities
- Discussion and reflection
- Question and answer sessions/informal quizzes
 - planned questions (like knowledge checks)
 - spontaneous questions peppered throughout instruction
- Discuss Lessons learned and “What if” scenarios
- Trainee self-evaluation of their progress and performance
- Trainee-feedback surveys (level I evaluation data)

Notes:

Write your notes here



Benefits of Formative Assessment

Immediate Benefits:

- Real-time feedback that occurs frequently allows for constant adaptation by both trainees and instructors.
- Can increase trainee motivation and engagement.
- Helps clarify instructional goals and objectives.
- Can improve overall trainee performance.

Long-Term Benefits:

- Instructors can analyze (anecdotally or statistically) how trainees respond to different practices to reinforce successes and learn opportunities for growth.

Fred demonstrated some strong techniques in the last step. Now let's see how he knows if the training is working?



Notes:

Write your notes here

Discussion



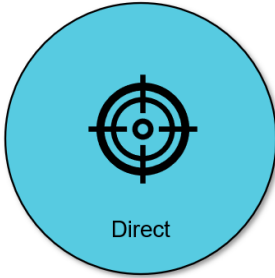
Think back to what we have just learned about the Zone of Proximal Development, scaffolding techniques, and formative assessment.

In the video we just watched, how is Fred utilizing these concepts?

Discuss with your small group and be ready to share.

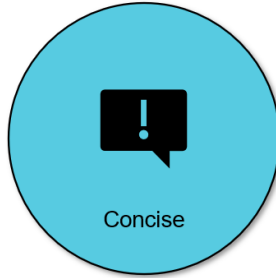
Type Take-Aways Here

How to Give Effective Feedback



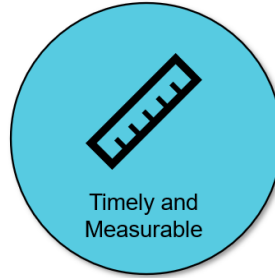
Direct

State the specific behaviors or skills that a trainee demonstrated and what made them effective or ineffective.



Concise

Help the trainee focus on the most important aspects to correct first.



Timely and Measurable

Provide trainee with feedback that is timely and verifiable.



Actionable

Offer suggestions that the trainee can act on. Suggestions should be practical, and achievable

Two Feedback Frameworks

Start/Stop/Continue

Stop: These are behaviors or actions by an individual that hurt performance and should stop as soon as possible.

Start: These are behaviors or actions an individual should start doing or implementing to increase performance and achieve goals more effectively.

Continue: These are behaviors or actions the team or individual is already excelling at and should continue doing.

Support/Empathy/Truth (SET)

Support – Get clear on how you want to express your support to the person.

Empathy – Empathize with their situation by speaking or demonstrating that you understand what they are going through and what they are feeling.

Truth – After speaking support and empathy you can speak the truth you know about the situation or person. Speaking the truth may be to help the person see the situation in a different view or even to speak to what you know about them or yourself.

Notes:

Write your notes here



As an instructor, it is incumbent upon you to:

- Notice when a trainee is struggling to grasp a skill or concept.
- Adapt the instructional approach to better serve the trainee in question.
- Close the learning gap.

Provide extra support

- Tutoring
- Extra practice
- Reference Material
- Study Guide
- Break content into smaller sections
- Peer mentoring
- Job shadowing

Now let's see how Fred ties it all together for Ellen...



Notes:
Write your notes here



Trainee is ready for evaluation when:

- Trainee can perform all tasks with little to no coaching.
- Trainee can answer safety questions with 100% accuracy.
- Evaluator can ensure the trainee will not make an error which would put personnel, equipment, the environment, or the facility in jeopardy at any time.
- Formative assessment indicates the trainee has grasped all components of the task or skill being trained.

Notes:

Write your notes here

Break Activity



Break Activity

Since the last break we discussed:

- Scaffolding
- Formative assessment
- Feedback
- Extra support

Use one of the post-its from your area and write the strategy you want to implement in your first/next OJT from the list above. Be as specific as possible.

Stick your post it on the door as you leave the classroom for the break.



Type Take-Aways Here

Unit One

Unit Two

Unit Three

Resources

Unit Three: Evaluation



Unit Three: Evaluation

After this unit, you will be able to:

- Recognize the requirements for successful completion of an OJT performance demonstration.
- Provide appropriate feedback for a performance demonstration evaluation.
- Complete an *Unsatisfactory OJT Evaluation with Remediation Steps* form for failing questions, tasks or subtasks.

Conducting a Formal Performance Demonstration

1. Define Clear Objectives for the Performance Demonstration
2. Set Clear Expectations with the Trainee
3. Prepare the Demonstration Environment
4. Conduct the Demonstration
5. Provide Immediate Feedback (when possible)
6. Follow Up on Areas for Improvement



Notes:

Write your notes here

Section 3: OJT Evaluator Guide

This *OJT Evaluator Guide* provides all the information you need in order to understand the following:

- Instructions to the OJT Evaluator
- Evaluation criteria
- *Unsatisfactory OJT Evaluation with Remediation Steps* form

Instructions to the OJT Evaluator

CAUTION

DO NOT ALLOW TRAINEE TO MAKE AN ERROR THAT WOULD PUT PERSONNEL, EQUIPMENT, THE ENVIRONMENT, OR THE FACILITY IN JEOPARDY AT ANY TIME DURING THIS EVALUATION.

- Review evaluation rules with the trainee, and ask if there are any questions before beginning the evaluation.
- During the evaluation do not allow the worker to ask questions; do not coach the worker in any way. The worker may consult reference materials (**except** the *OJT Trainee Guide*) at any time during the performance evaluation but may not ask you to clarify on any task or item.

NOTE

The evaluator may require the trainee to talk through a performance step before performing it. The evaluator must take care not to agree or disagree with the trainee's statements; this would be coaching. However, an exact repeat-back is not coaching.

- During the performance evaluation, ask safety and knowledge questions (including Safety Basis, TSR, and/or DSA questions, if applicable) **verbatim**. Evaluate only knowledge and safety questions, as well as performance steps, that are included in the *OJT Trainee Guide*.
- As a trainee responds/performs acceptably to a question or performance task, write your initials in the "SAT" column and date it. When every item is a "SAT," submit the completed copy to your training coordinator or training administrator.
- If a trainee fails to answer safety/knowledge questions or performs tasks/subtasks improperly, write your initials in the "UNSAT" column and date it. For all failures, you must complete the *Unsatisfactory OJT Evaluation with Remediation Steps* form (the last page) and submit it to the instructor(s) as well as to your training coordinator or training administrator for recordkeeping purposes.

Evaluation Criteria

Evaluate the trainee using the criteria below.

- If a trainee responds incorrectly to a safety-related question it is an automatic failure of this evaluation. Safety questions require 100% accuracy (including Safety Basis, TSR, and/or DSA questions, if applicable).
- The trainee must successfully respond to all knowledge questions with 80% or better accuracy.
- Incorrectly **performing** one (1) critical step or two (2) non-critical steps constitutes a failure of this evaluation. A **critical step** in a performance demonstration is defined as a step that, if incorrectly performed or performed in the wrong order, may cause the following: personnel injury or a safety issue; equipment damage or cause a Technical Safety Requirement/Review (TSR), and/or; significant recovery time.

Links: [Policy and Forms](#)

Notes:

Write your notes here

Trainee Evaluation of OJT Instruction and Evaluation

Please take the time to complete the following course evaluation after you have completed the OJT performance evaluation. Your feedback is important to assist us with the effectiveness of this course.

Course #		Title:
Instructor		
Date		

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. This OJT was a good use of my time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. This OJT will enable me to perform this task safely and correctly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The learning objectives found in this OJT were appropriate to the task being trained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The performance evaluation portion of this OJT was effective at measuring how much I learned during the instructional portion of the OJT.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Rate your level of knowledge:	Low		High		
	Before the OJT instruction and evaluation				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
After the OJT instruction and evaluation					
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you marked "Disagree" or "Strongly Disagree" to any of the above, please let us know why (in detail):

What changes would you recommend to make to this OJT course more effective?

Links: [Policy and Forms](#)

Notes:
Write your notes here

Evaluation Process

Objectives and Expectations

During the Evaluation-
Just be Super Clear!

Immediate Feedback

Remediation

Objectives and Expectations

- Explain the Purpose of the Demonstration
- Ensure the trainee and evaluator both have clear understanding of the expectations for the demonstration (available reference material, equipment, safety measures)
- Identify Key Tasks
- Review the core tasks fundamental to the procedure/process/tasks being evaluated
- Set Performance Standards and Explain Assessment Criteria
- Safety and knowledge questions are verbatim from OJT guide
- No coaching during the demonstration
- Safety questions require 100% accuracy
- Missing one critical or two non-critical steps constitutes failure
- Encourage Questions
- Is trainee fully ready for the demonstration



Unit One

Unit Two

Evaluation Process

Objectives and Expectations

During the Evaluation-
Just be Super Clear!

Immediate Feedback

Remediation

During the Evaluation – Just be Super Clear!

- The evaluator may ask the trainee to talk through a performance step before performing it.
 - The evaluator must take care not to agree or disagree with the trainee's statements; this would be coaching. However, an exact repeat-back is not coaching.
- Avoid coaching!!!!!!!!!!!!!!
- Safety questions require 100% accuracy (including Safety Basis, TSR, and/or DSA questions, if applicable)
- Knowledge questions require 80% or better accuracy.
- Incorrectly **performing** one (1) critical step or two (2) non-critical steps constitutes a failure.

A **critical step** in a performance demonstration is defined as a step that, if incorrectly performed or performed in the wrong order, may cause the following:

- personnel injury or a safety issue;
- equipment damage or cause a Technical Safety Requirement/Review (TSR), and/or;
- significant recovery time.



Unit Three

Resources

Notes:

Write your notes here

Activity



With your group, please review the laminated pages with a Mock Performance Evaluation.

Consider the Trainee's Performance:

- Review and score the Safety Question answers
 - Be prepared to discuss.
- Review and score the Knowledge Question answers
 - Be prepared to discuss.
- Review and score the Task Performance Steps
 - Be prepared to discuss.

Was your trainee successful?

CAUTION
DO NOT ALLOW THE TRAINEE TO MAKE AN ERROR THAT WOULD PUT PERSONNEL, EQUIPMENT, THE ENVIRONMENT, SECURITY, OR THE FACILITY IN JEOPARDY AT ANY TIME DURING THIS EVALUATION.

TASK PERFORMANCE STEPS	*SAT/UNSAT
Task/Subtask #1 Prepare for inspection	
Step 1: Wear appropriate PPE (e.g., electrical-rated gloves, safety glasses if required by policy or environmental conditions).	SAT _____ UNSAT _____
Step 2: Gather all tools and testing equipment (e.g., multimeter, electrical safety analyzer).	SAT _____ UNSAT _____
Step 3: Ensure test equipment is calibrated and functional before use (check the calibration sticker or run a self-test).	SAT _____ UNSAT _____
Add or delete tasks/subtasks and steps as needed.	*Initial the result.

TASK PERFORMANCE STEPS	*SAT/UNSAT
Task/Subtask #2 Perform Visual Inspection	
Step 1: Unplug the device from the power source before handling.	SAT _____ UNSAT _____
Step 2: Examine the power cord: <ul style="list-style-type: none"> • Look for fraying, exposed wires, melted insulation, or cracks. • Check that the ground (third) prong is intact and not bent. 	SAT _____ UNSAT _____
Step 3: Inspect the plug head for burn marks, looseness, or warping.	SAT _____ UNSAT _____
Step 4: Check the casing for: <ul style="list-style-type: none"> • Cracks, dents, or signs of fluid intrusion. • Loose components or damaged buttons. 	SAT _____ UNSAT _____
Step 5: Inspect electrodes/leads (if present) for corrosion or exposed wires.	

Type Take-Aways Here

Evaluation Process

Objectives and Expectations

During the Evaluation- Just be Super Clear!

Immediate Feedback

Remediation

Immediate Feedback

- After the performance demonstration, provide immediate, respectful, and constructive feedback to the trainee.
- Acknowledge efforts
- Identify areas of deficiency
- Provide clear, actionable feedback
- Gauge trainee understanding



Unit One

Unit Two

Unit Three

Resources

Notes:

Write your notes here

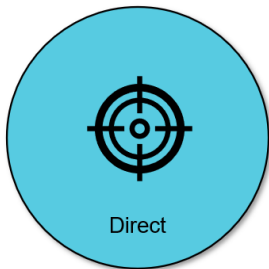
Discussion



Mock Performance Demonstration

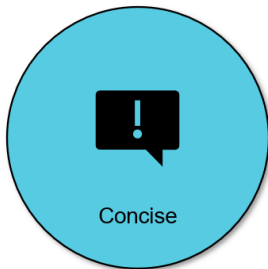
How would you structure your feedback for this trainee?

Discuss with your group. Be prepared to share.



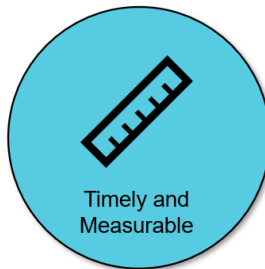
Direct

State the specific behaviors or skills that a trainee demonstrated and what made them effective or ineffective.



Concise

Help the trainee focus on the most important aspects to correct first.



Timely and Measurable

Provide trainee with feedback that is timely and verifiable.



Actionable

Offer suggestions that the trainee can act on. Suggestions should be practical, and achievable

Type Take-Aways Here

Evaluation Process

Objectives and Expectations

During the Evaluation- Just be Super Clear!

Immediate Feedback

Remediation

Remediation

Understand the Root Cause

- Analyze evaluation tasks for break-downs
 - Knowledge
 - Skill
 - Confidence
 - Other factors
- Interview the trainee
- Assess training gaps
 - Is the lesson content clear and comprehensive?
 - Was the training sufficient (be honest!)

Develop a Plan

- SMART Goals
 - Specific, Measurable, Achievable, Relevant, Time-bound
- Develop remediation activities
 - More practice
 - More coaching
 - Job shadowing
 - Additional study materials
- Establish a timeline
- Monitor progress
 - Follow established checkpoints for feedback, redirection and reinforcement

Notes:

Write your notes here

Unit One

Unit Two

Unit Three

Resources

3.6.2 Training Records

Training records must be handled as Controlled Unclassified Information (CUI). This includes data that identifies laboratory workers with training completions or assignments (i.e., transcripts, curriculum assignments, rosters, and e-mail notifications).

UTrain is the official training records repository for LANL housing records for training and assignment.

3.6.2.a(3) Training Rosters

Training rosters are: Signed (*in ink, electronically, or via electronic form by the workers*)

- At a minimum, must include: Z-numbers, Date of attendance, Course title and UTrain item number, Lead instructor's signature.

3.6.2.b Training Records Submittal

Instructors must send completed training attendance records to their designated training coordinator or training administrator within two working days of the time the record is generated.

Conclusion

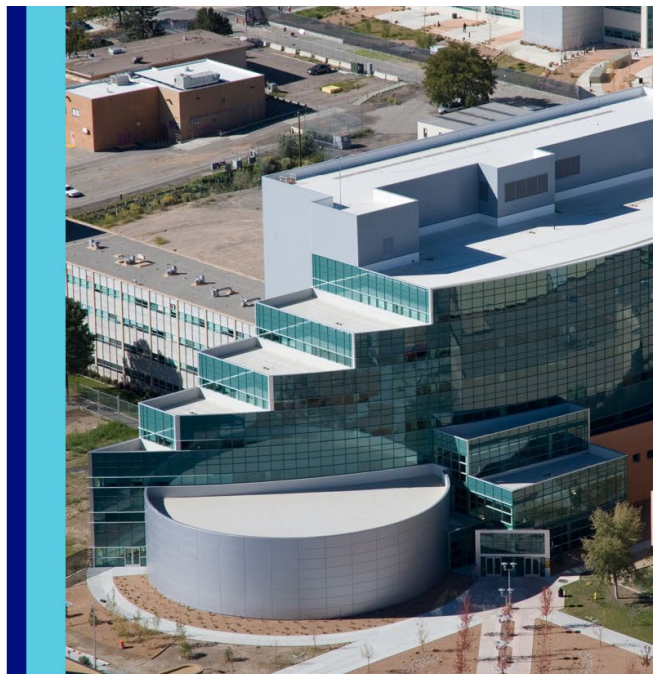


Notes:

Write your notes here

Becoming Qualified

- The OJT initial qualification process includes three steps:
 - Completion of today's course
 - Complete of the Utrain quiz covering today's course (will be assigned at COB on date of course completion) You can use your course manual for the quiz
 - Completion of an OJT Instructor/Evaluator Evaluation back in your organization (FORM 2150)
- The OJT Instructor/Evaluator requalification process includes two steps to be completed every 24 months:
 - Completion of an OJT Instructor/Evaluator Evaluation back in your organization (FORM 2150)
 - Completion of Utrain course #60424. TSQP: OJT Instructor Continuing Training



Form 2150

Los Alamos NATIONAL LABORATORY

On-The-Job Instructor/Evaluator Evaluation Entry Level and Requalification Verification Form 2150

Section 2: Entry-Level Education & Experience Verification

This form must be completed for the initial qualification and requalification of the OJT instructors/evaluators qualified under the TSQP On-the-Job Instructor/Evaluator Qualification Standard (ITS-QS-006 and Utrain CUI# 411). Once complete, submit to TSQP@LANL.GOV.

Los Alamos NATIONAL LABORATORY

On-The-Job Instructor/Evaluator Evaluation Entry Level and Requalification Verification Form 2150

2. Verification Signatures

Employee Name (<i>print</i>)	Signature	Z Number	Date
RLM Name (<i>print</i>)	Signature	Z Number	Date

Links: [Policy and Forms](#)

Notes:
Write your notes here

Group Activity



Group Activity: Let's evaluate Fred.

In small groups, teams will complete Form 2150 to evaluate Fred's OJT teaching.

As you complete the evaluation think about Fred's greatest strength(s) and an opportunity for growth.

Course Implementation				
The OJT Instructor/Evaluator:	BE	ME	EE	NA
1. Was organized and prepared when the training session began.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Followed the approved lesson plan, course materials, and required equipment to deliver effective and technically accurate training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Explained the purpose of the training and covered the learning objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Engaged the trainee's background knowledge and prior experiences with the content of the training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Demonstrated a variety of questioning techniques (e.g. open and close ended, direct, probing, etc.) to encourage trainee engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Used examples, analogies, lessons learned, and experience consistent with the lesson plan to promote learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Followed the three-step method for OJT: demonstrate (I do), facilitate guided practice (we do), allow independent trainee practice (you do)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Demonstrated effective time-management skills to cover required material and adapted the pace to meet the students' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Redirected and coached trainee misunderstandings/mistakes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Displayed a thorough knowledge of subject matter and safety requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Reviewed appropriate critical and safety steps during the training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Evaluated trainee throughout the OJT to determine strengths and weaknesses and, if applicable, trainee readiness for release for evaluation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Created a positive and inclusive training environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OJT Evaluation (if applicable)				
The OJT Instructor/Evaluator:	BE	ME	EE	NA
14. Reviewed evaluation criteria for both performance and knowledge elements with trainee prior to conducting the evaluation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Evaluated the trainee according to the criteria in the OJT checklist.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Did not coach or "lead" the trainee during the evaluation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Asked knowledge-based questions based on those on the OJT checklist.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Provided actionable feedback to the trainee immediately following the OJT evaluation, including any remediation process steps (if necessary).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Record Keeping				
The OJT Instructor/Evaluator:	BE	ME	EE	NA
19. Completed all related evaluation documentation, including remediation needs, if applicable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Links: [Policy and Forms](#)

Type Take-Aways Here

Wrapping it up



Get back with your partner from the first activity of the day. Together discuss what you learned today, what stood out, what you will use immediately, etc.

Then complete this sentence.

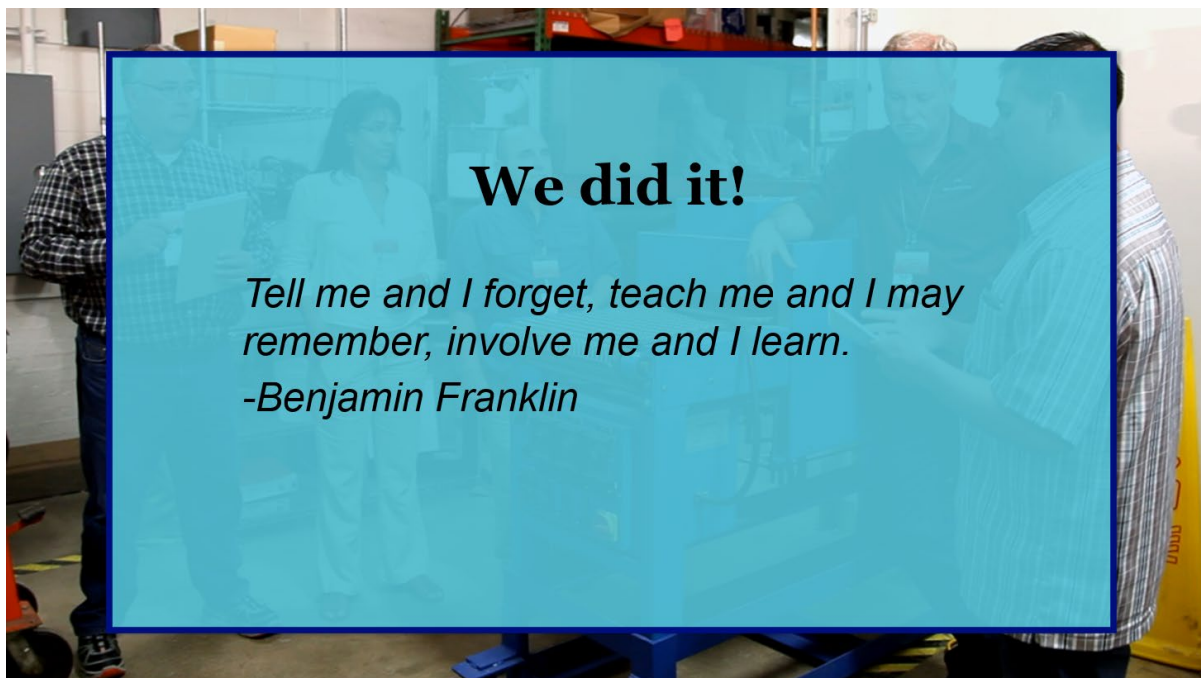
“I used to think OJT instruction _____,

Now I think OJT Instruction _____.”

If you feel comfortable, when the group comes back together, reintroduce your partner. This is {NAME} and they used to think OJT instruction _____ and now they think OJT instruction _____.”

Type Take-Aways Here

**Please Remember to Submit
Your Level I Feedback Surveys!**



Notes:
Write your notes here

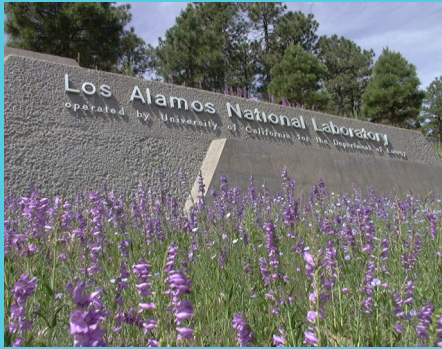
Resources

Unit One

Unit Two

Unit Three

Resources



Contact Information

Website: [Training Staff Qualification Program](#)

Email: tsqp@lanl.gov

Additional Resources

[Technical Training Services](#)

[Policy and Forms](#)

[LANLInside](#)

