# Scope of Work

**General description of work to be performed:** Utility Learning and Development (ULD) will develop a training program for Control Operators and/or any other identified positions within the Distribution Control Center (DOC.) This training will be used by all four states/jurisdictions and will include any minor requirements that are specific to a single state/jurisdiction. This training will be developed according to the job roles and duties currently in place and will not incorporate changes that may occur with the AMI/Grid Modernization plan and future changes to computer based applications, systems, processes and upgrades. The purpose of this training is to fulfill the current needs of the individuals performing the duties now.

1. General
   1. ULD will develop a training program based on the program currently used by DOC MS with the input and advice from Subject Matter Experts (SMEs) provided by the state/jurisdiction management.
   2. ULD will schedule an initial meeting with key stakeholders and SMEs to launch project commencement, define roles and responsibilities and determine project approval process.
   3. ULD will lead the SME team and be responsible for scheduling all meetings, making task assignments, creating project plans and developing timelines.
   4. ULD will drive the project and rely on the input, collaboration and expertise of the SMEs team for guidance and support during the project’s development.
      1. The SME team will meet via WebEx or in person at designated dates and times as deemed necessary by the development progress. ULD will work with the SME team to insure consideration is given regarding their schedules and work load.
      2. The SME team will provide any and all documentation, job aids, websites, slide decks, reference manuals, syllabuses, access to vendor provided training or any other source of training that is being used to train employees currently.
      3. The SME team will provide support to the ULD individually or as a group to answer questions, provide documentation, and review training content as needed and provide feedback regarding accuracy within a timely manner.
      4. ULD will provide the SME team with regular updates to the status of the project and any action items outstanding within a timely manner.

# Project Plan: Curriculum Development for DOC Training Program

## Analysis

### Current Training Development Initiatives

#### ULD will contact the project leads/managers of current DOC training development initiatives regarding the scope, context and content of those initiatives to insure no duplication of effort exists.

##### PwC Lead: Tracy Roudebush (tracy.roudebush@pwc.com) and Danielle VanDyke (danielle.vandyke@pwc.com)

##### PwC Instructional Design Lead: Yi Zhang (yi.x.zhang@pwc.com) …leading ARCOS Learning Design Workshops

##### Brendon Oldendorf: DMS/OMS Project. Manager

##### Kristyn Kemp: DMS/OMS Change Management Lead

#### ULD will request from the above development contacts access to any and all analysis that has been conducted.

##### Documentation of processes

##### Relevant content collected and/or created

##### Any other relevant analysis results or documentation that would support this training project.

### Identify resources

#### Identify key stakeholders/corporate sponsors from each state/jurisdiction and ULD.

##### MS: **Randall Vaughn**, Mgr., Distribution Dispatch, MS Distribution Dispatch

##### LA: **Joseph Book**, Mgr., Distribution Dispatch, LA Operations DOC; **Dennis Lytle**; Sr. Mgr., Operations & Safety-LA, La Operations Manager

##### TX: **Mark Bangoy**, Mgr., Distribution Dispatch, Dist. Ops Texas-Dist. Ops Center

##### AR: **Dean Williams**, Mgr., Distribution Dispatch, AR Distr. DOC

##### ULD: **Chris Elliot**, Supervisor, Utility Learning and Development

#### Identify SME team members from each state/jurisdiction and identify curriculum developer from ULD.

##### MS: **Ron Robinson, Sr.**; Operations Coordinator, MS Distribution Operations Center; M-SOTH-452; External: 601-351-4160; Cell: 601-810-5059; email: rrobin6@entergy.com

##### LA: **Wade Stiles**, Operations Coordinator; L-ESSN-1A; LA Operations DOC; External: N/A, Cell: N/A; email: wstiles@entergy.com

##### TX: **Rodney Wilson**, Supv, Dist Dispatch; T-EP-12D; Dist. Ops Texas-Dist. Ops Center; External: 409-981-2975, Cell: N/A; email: rwilso5@entergy.com

##### AR: **Jake Brighter**, Supv, Dist. Dispatch; A-9LA-DDC; Dist. Ops AR-Dist. Ops Center; External: 501-396-4908, Cell: N/A; email: jbrigh1@entergy.com

##### ULD: **Melissa McCoy**, Training Specialist, Sr.; M-EMTR-1A; Utility Learning and Development; External: 601-926-4831, Cell: 601-622-5684; email: mharpe1@entergy.com

#### Identify job titles/positions (Attachment 1) at each DOC center and determine which are to be included in training program.

#### Obtain and/or verify current job descriptions (Attachment 2) for each position to be included in training program.

#### Identify and obtain current training provided by each state and collect content/training materials currently used.

##### MS

###### Formal and/or informal training programs.

###### Job aids or resources.

###### Answers to training analysis interview questions (Attachment 3)

##### AR

###### Formal and/or informal training programs.

###### Job aids or resources.

###### Answers to training analysis interview questions (Attachment 3)

##### TX

###### Formal and/or informal training programs.

###### Job aids or resources.

###### Answers to training analysis interview questions (Attachment 3)

##### LA

###### Formal and/or informal training programs.

###### Job aids or resources.

###### Answers to training analysis interview questions (Attachment 3)

### Conduct performance/gap analysis.

#### Determine performance gaps.

##### ULD will interview employees performing in current position and document feedback. (i.e.: Have you received: clear expectations, regular feedback against those expectations, tools, systems, job design, consequences for performance etc.)

##### ULD will observe employees performing in current position and document characteristics and constraints.

#### Determine training gaps.

##### ULD will conduct surveys with employees performing in selected position(s) and document feedback.

##### ULD will conduct surveys with supervisors of employees performing in c selected position(s) and document feedback.

### Review and prepare results.

#### Existing training resources.

###### Does training exist and where is it located?

###### Were objectives set and were they met?

###### Were methods of delivery determined and what were they? Who delivered the material if applicable?

###### What methods were used to measure success? What were the outcomes?

###### Does the current training content meet the needs required of the position/department/company?

#### Prepare analysis results and develop project plan recommendations.

##### Performance/gap analysis

###### Interview results

###### Survey results: employee and supervisor

##### Existing training resources

###### Analysis results

### Present findings and request approvals.

#### Prepare and present analysis results, recommendations and solicit and document feedback to/from SME team.

##### Analysis results

###### Job descriptions

###### Existing training resources

###### Performance/training gaps identified

##### Recommended program outline.

###### Topics and/or module/course titles.

###### Delivery methods.

###### Evaluation methods.

##### Solicit and document feedback from SME team and make adjustments to recommended program outline.

#### Prepare collaborated results (by ULD and SME team) and submit recommendations to key stakeholders/managers/TAC for approval.

#### Obtain approval of program outline and begin design phase.

## Design

### From program outline created through analysis phase establish framework for:

#### Timeline, milestones and deadlines

#### Module titles and objectives

#### TPEs (if needed)

### Ascertain the following information and create course descriptions (Attachment 4)

#### Course ID, title, training category, work groups, delivery method, experience, prerequisites, and estimated delivery time.

#### Course sections, description, objectives, and essential review questions

#### Materials required to teach course: tools/equipment, videos/PPT slides, props/job aids, course materials.

#### References: Industry and Entergy procedures.

#### Additional resources for further study, exercises and activities, operation/performance tasks (List of TPEs only-further explanation later in plan.)

#### Assessment methods and “Why” statements.

### Create course development plan and milestones.

### Submit program outline, course descriptions, development plan and milestones for approval.

## Develop

### Prepare course syllabus for each module based on course description documents.

### Prepare instructor resources.

### Prepare student resources.

## Implement

### Select instructors/delivery method

#### Conduct train the trainer sessions.

### Schedule pilot program.

### Deliver pilot program.

## Evaluate

### Evaluate program based on:

#### Instructor feedback.

##### Program delivery.

##### Functionality of materials.

##### Ease of instruction.

#### Learner feedback.

##### Program delivery.

##### Value/quality of materials.

##### Ease of understanding.

#### Field management feedback.

##### Learner feedback to management.

##### Observations.

###### In class.

###### In field.

#### ULD management feedback.

##### Classroom observations.

##### Hands-on/practice observations.

### Return to development stage to make necessary changes based on evaluation results.

# Attachments:

# Attachment 1

Identified Job Titles/Positions

The following job roles were identified based on research conducted via the Entergy SharePoint site:

## MS Distribution Dispatch

Job Titles:

Distribution Operator Trainee

Distribution Operator I

Distribution Operator II

Distribution Operator, Sr.

Operations Coordinator

Meter Services Specialist

# LA Operations DOC

Job Titles:

Distribution Operator I

Distribution Operator II

Distribution Operator Sr.

Operations Coordinator, Lead

Sr. Engineer (TBD)

Supv. Dist. Dispatch

Electric GIS Assistant

# ARK DISTR DOC (9TH&LA)

Job Titles:

Distribution Operator I

Distribution Operator II

Distribution Operator Sr.

Operations Coordinator, Lead

Clerk IV – Dist.

Engineer II (TBD)

Mgr., Distribution Dispatch

# Dist. Ops Texas-Dist. OpsIden Center

Job Titles:

Distribution Operator

Distribution Operator I

Distribution Operator II

Distribution Operator Sr.

Meter Services Specialist

Admin Asst. I- Dist.

Engineer I (TBD)

# Attachment 2

Job Descriptions

The following was captured from a job posting found on Success Factors:

Job Title: Distribution Operator I-Sr.

# **Primary Location: Texas-Beaumont**

**JOB SUMMARY/PURPOSE:**

Maintain operation of the distribution system, including all aspects of switching, system configurations and operations.

**JOB DUTIES/RESPONSIBILITIES:**

Dispatch and manage personnel for response to trouble calls, including alter hours service restoration.

Communicate proactively with line and other personnel in order to obtain outage information. Prioritize outages to optimize available resources, manage the afterhours call out process, monitor SCADA systems and respond appropriately to alarms.

Monitor/make use of all-weather tools and alert affected personnel regarding the potential for severe conditions.

Provide feedback to Data Maintenance Support personnel regarding changes, missing devices, incorrect predictions, etc., in AM/FM.

Enter outage information in AM/FM and provide Entergy support personnel and customers with timely and accurate restoration information.

**MINIMUM REQUIREMENTS:**

**Minimum education required of the position**

High school diploma or equivalent.

**Minimum experience required of the position**

Minimum of 5 five years distribution, transmission or substation experience or equivalent.

**Minimum knowledge, skills and abilities required of the position**

Strong knowledge of computers and related technology. Ability to work irregular hours and out of town assignments as required. Strong communication and organizational skills. Ability to communicate effectively over the telephone and radio. Ability to take and understand directives and complete tasks.

Ability to make timely and safe decisions regarding outage restoration. Ability to work safely and follow all Entergy safety policies and procedures. Excellent leadership skills. Strong decision making skills. Ability to manage multiple activities and changing priorities. Self-motivated and dependable team player. Ability to work well under pressure. Ability to recognize hazards in the workplace and have the ability to mitigate the hazards. Ability to maintain and care for Company equipment properly and safeguard assets. Ability to meet the public in a pleasant and tactful manner and understand the importance of delivering a high level of customer service. Demonstrated acceptance of a diverse and inclusive work environment and customer base. Ability to obtain Critical Cyber Access. Desired: Ability to lead and participate in problem solving teams as required; Ability to recognize opportunities for process improvement and have the ability to enact change.

**Any certificates, licenses, etc. required for the position**

None

# Attachment 3

Training Analysis Interview Questions

# Program Vision and Expectations

Describe significant and essential learning that learners must achieve, and can reliably demonstrate at the end of this program. Identify what the learner will know and be able to do by the end of this program.

## What does the department want to achieve as a result of this program?

## How does the department expect to see results related to business outcomes?

## What external factors needs to be considered?

## What internal constraints, like budgets or timing, could limit the program?

## What are your expectations regarding the development plan?

### Milestones

### Completion date

# Competency Assessment

A competency assessment focuses on how well an employee is performing the required job skills in relation to specified performance standards. This approach identifies existing competencies and skills gaps of your current and potential employees. An employee can even self-assess his/her skills to determine what training is required for skill development.

## Have performance standards been established and communicated to the identified job roles/participants?

## How are behaviors or actions identified and measured?

## What knowledge and skills should employees already have to qualify for this role/position? To what level?

## What knowledge and skills do participants need to be successful?

### How important are each of the knowledge and skills that you have mentioned?

### What is happening in your department that shouldn’t be happening?

### What is happening in your department that should be happening?

### In your opinion, what are your current needs?

#### What are some of the problems you are having that would indicate training is needed?

#### How long has this been a problem?

#### When or how frequently do you observe it or how often does it occur?

#### What would indicate to you that the problem was resolved?

### What are your current strategies for meeting those needs?

## What other information or data exists that provides information about these business/department needs or problems?

## What things, other than knowledge and skills, might be preventing employees from performing as they should?

Examples: Clear expectations, regular feedback against those expectations, tools, systems, job design, consequences for performance etc.

# Participants

Participant analysis is the process of gathering information about the targeted training audience to design effective training programs that cater to the learners’ needs, preferences and motivations. Data gathered can determine barriers to success as well as which training methods will be most effective.

## Which job roles are involved?

### Have clear, attainable objectives been set for the job roles involved? (i.e. job descriptions, goals, expectations.

## What would excellent performance look like?

## What are the individuals’ key characteristics or constraints?

# Evaluation of Program Effectiveness

Evaluation is a process that critically examines a program. It involves collecting and analyzing information about a program’s activities, characteristics, and outcomes. Its purpose is to make judgments about a program, to improve its effectiveness, and/or to inform programming decisions.

## How will you measure the desired outcomes?

## How will we know if the program is effective?

### To what extent is the need being met?

### Is the program operating as planned?

### Is the program achieving its objectives?

### What predicted and unpredicted impacts has the program had?

# Attachment 4

Blank Course Description Worksheet

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| --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | | | | | |
| Course ID: |  | **Title:** | |  | | | |
| **Training Category:** | |  | | | | | |
| **Work Groups:** | |  | | | | | |
| **Delivery Method:** | |  | | | | | |
| **Prerequisites:** | |  | | | **Experience Level:** | |  |
| **Estimated Delivery Time:** | | Class: |  | | Field/Lab: |  | |

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| **Sections:** | |
| Section 1: |  |
| Section 2: |  |
| Section 3: |  |
| Section 4: |  |
| Section 5: |  |

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| **Course Description:** |
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| **Objectives:** | |
| Upon completion of this module, the trainee will be able to do the following: | |
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| **Essential Review Questions:** |
| **Section 1:** |
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| **Section 2:** |
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| **Section 3:** |
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| **References:** | | |
| **Industry:** | **Entergy Procedures:** | |
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| **Materials:** | | |
| **Tools/Equipment:** | | **Videos/PPTX:** |
|  | |  |
| **Props/References:** | | **Course Materials:** |
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| **Additional Resources** |
| This module presents thorough resources for task training. The following resource material is suggested for further study. |
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| **Exercise/Activities:** |
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| **Operations/Performance Tasks (TPE):** | |
| **NOTE: The employee’s skill and ability proficiency is based on the enabling operation(s) that have been successfully completed. The operations tasks are listed below:** | |
| Under the supervision of the instructor, the trainee should be able to do the following: | |
| **Description of Task** | **Result/Answer** |
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| **Assessment Types:** |
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| **Why Statements:** |
| **NOTE: (Provided by Standards group as required.)Reasoning for the training and consequences of the failure to correctly perform the associated tasks.** |
|  |

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