

## FTCP Virtual F2F February 2021 Meeting Minutes – Discussions, Decisions, and Actions February 16-18, 2021

➤ Roll was taken virtually for both days and we had 75 participants! Thank you all for participating!

### 1. DAY ONE – Welcome and Introductions – Karen Boardman

- Karen thanked and welcomed the group.
  - We want to make sure that implementation of the Order is whole and guidance is clear; we also want to address any issues.
- Karen introduced the speakers for today's session:
- Andy Delapaz, AU Agent: replaced Pat Worthington, who recently retired; background with Livermore; 26 years in DOE.
  - I am with AU-30, Office of Nuclear Safety, and stepped into big shoes to fill as the AU Agent working with Jeanette Yarrington.
  - I will continue to support the AU staff with Order implementation and helping the safety folks who need assistance, and more broadly, build on the accomplishments of Pat and Jeanette to sustain a culture of excellence.
  - Looking forward to and hoping to learn new and best practices for Order implementation, and by the end of the calendar year, to get accredited and see what we can do to get everyone accredited.
- Todd Lapointe, Deputy Associate Under Secretary for Environment, Health, Safety and Security, AU-1
  - The AU Agent position is posted and it is my intention that Andy continue in this role even after we have someone selected. He is working well with SC, etc., and it will be a benefit to make him the permanent AU Agent, along with Jeanette from AU-10, in the OPI role, in addition to the new person.
- John Dupuy, Deputy Director, Office of Enterprise Assessments, EA-1
  - It's been almost a year since the update of the DOE O 426.1B, *Federal Technical Capabilities* was issued last March.
  - Implementing new requirements and maintaining rigor to ensure a competent federal workforce to carry out DOE missions safely is the priority.
  - A lot has happened this last year due to the Covid Pandemic—telework posture, and a new Administration. Yet, despite all of these changes, with the FTCP's enduring commitment, technical qualifications prevailed and used best practices to implement, identify and engage training and qualification for all DOE.
- Karen named and welcomed the new participants in our FTCP Group:
  - Debbie Sheldahl, NTC: Supporting the eTQP Learning Nucleus transition efforts with Melissa Otero and Walter Meeks.
  - Dean Triebel: Office of Secure Transportation (OST), NA-152, OST Agent/TQP Coordinator.
  - Janis Romo: EMCBC-NFO, TQP Coordinator for NFO.
  - Tim Henderson: Carlsbad Field Office (CBFO), current CBFO Agent (G. Basavilbaso recently turned over Agent responsibilities).
  - Chauntel Simmons: DOE-Idaho: Working with Mark Brown as Alternate Agent/TQP Manager at Idaho (replacing Julie Finup, who retired in February).
  - Cheri Noble: Office of Policy, Accountability, and Security Division, NA-MB-10, Representing the NNSA TQP Program Office.
  - Jeff Roberson also introduced Julie Spyres, the new NNSA Chief Learning Officer, replacing Dave Rude.

## 2. Implementation of DOE O 426.1B and Summary of Questionnaire Responses – Al MacDougall

- EA- Office of Enterprise Assessments
  - The NTC updated the EA TQP plan to reflect current Order requirements and responsibilities.
  - Organization expectation for CT hours is 80 hours and 40 of these hours should pertain to the primary QS. This approach could also apply to PSQS and JSQS. The remaining hours can be towards the OSQS and other technical standards assigned. EA is assigning the 5-year cycle with 20 hours per year. The intent of this approach is to complete yearly continuing training requirements to help maintain proficiency and also to avoid completing all 80 hours in the last year of the 5-year cycle.
  - The NTC is in the process of developing the EA TQP OSQS with a common core; sub offices will have JSQs assigned as appropriate.
    - Major processes: We will do a video presentation by the Senior Leaders. Envisioning a Qual Card (QC) with 4 or 5 competencies on it, with an acknowledgement for reading documents as assigned.
  - NTC will share completed EA OSQS and JSQs with the group as they are developed.
- The FTCP website has other site's documents here for sharing:  
<https://www.energy.gov/ehss/worker-health-safety-policy-guidance-reports/federal-technical-capability-program-ftcp/ftcp-2>. Please work with Jeanette Yarrington to update your site info.
- Discussed using a tracking tool for assigning Continuing Training (CT), like a Position Evaluation Questionnaire (PEQ), but modified for CT. NNSA currently has a Continuing Training Progress Tracker and this tool may be beneficial to the group.
  - The TQP-150 Overview link is now available on the LN. The TQP-150 Overview video will be converted into an eLearning format later this year, but for the time being participants can complete the course on the LN and can retrieve an acknowledgement certificate. For other training, if learning that is not tied to quals, we can discuss this approach in more detail at future meetings. (See Parking Lot Topics for March Meeting).
  - Audio evaluation guides are designed so that participants can quickly obtain knowledge, but are not designed with a knowledge check to verify completion.
- NNSA-National Nuclear Security Administration Order Implementation – Jeff Roberson
  - Bottomline, we did not have any major issues; everything was workable. We did have some challenges developing HQ-specific OSQs and incorporating unique requirements. Will share the final products when they are completed.
  - Greg Houchin put together a SharePoint site for TQP collaboration efforts.
  - NNSA-SD: worked through the latest revision and it is set to go into RevCom this week, for a 30-day review.
  - Another challenge is Continuing Training Program Tracker (CTPT) items; modified the current CTPT form to include required reading, course documentation, and MPAs completed.
  - The NNSA CTPT form captures all the requirements for 5-year tracking; we have modified our tool for the 80 hours and to track MPAs over the 5 years.
  - If possible, NNSA would like a similar tracking system in the LN as already exists in eTQP to capture tracking of these tasks by individuals, such as the method used in other professional certifications like PMCDP, that go to the supervisor for approval.
  - Another challenge is that some are behind on CT requirements, and we are trying to work with them to make sure they are completing.
  - For those who have more than one primary qualification, we try to be more flexible in terms of working with them to complete CTPT.

- EM-HQ-Environmental Management Order Implementation– Brenda Hawks
  - We have a new employee who will handle FTCP activities/documentation and develop a timeline for our implementation plan.
  - Every supervisor ensures our people are brought up to speed on competencies.
  - We are looking at developing an OSQS for our organization.
  - Nuclear Safety and Chemical Safety will be released; Chemical Safety in the field has a broad breadth and is different than IH requirements/lessons-learned.
  - We are reviewing different tracking tools used and templates and are in the process of updating personnel records in eTQP.
- EM-SR Order Implementation– Mike Mikolanis/Tom Kohler
  - We developed a SharePoint site for entering/approving CT hours.
  - Our updated TQP procedure is in development and we have a bit more work to do.
  - We would appreciate guidance for developing an OSQS; also need to develop JSQs for Contractor Assurance Oversight, Issues Management System Oversight.
  - Clarification provided on taking someone out of a Primary FAQs and put them into a more specified JSQs; this is allowable.
  - OSQS focus is for the entire operations office that will include the overall mission and common processes that everyone needs to know. Then, focus on more specific competencies for each sub office, as needed.
- SC – Office of Science Order Implementation – Joanna Serra
  - We have more sites-Brookhaven, etc. transitioning over to SC; will include Radiation, FRs, STSM tracks.
  - We are finalizing the OSQS; modeled after Sandia's and Livermore's OSQs.
  - We are finalizing a draft TQP Procedure,
  - We are also working with NTC for developing an Accelerator Safety JSQs.
  - Getting documentation uploaded in a maintained SharePoint site for tracking CT hours; reaching out to others for suggested fire protection training not targeting FRs or STSMs.
  - Need to broaden the availability for CT other than NTC training, for people to get credit for it. (See Parking Lot Topics for March Meeting).
  - Jeff Roberson suggested the Safety Basis community cutting edge practices—leveraging those groups to enhance the knowledge transfer; TQP knowledge transfers initiatives.

**ACTIONS:** Karen will research other communities for a list of available Continuing Training and provide it for discussion prior to the March monthly meeting.

AI will work with Jeff Roberson to get the list of prioritized “Just-in-Time” training ideas from various SMEs across the NNSA.

- AU – Environment, Health, Safety and Security Order Implementation – Andy Delapaz/Jeanette Yarrington
  - We are working on our updated TQP Procedure; will use eTQP for tracking.
  - Expecting to learn lessons from others.
  - Will be developing an OSQS soon using others' templates; will be incorporating safety procedures and S&S into it. We currently do not have any assigned JSQs.
- DOE-ID – Idaho Operations Office Order Implementation – Chauntel Simmons/Mark Brown
  - TQP Procedure has been modified and now in review/approval process.
  - Required CT tracking in progress for STSMs, FRs and SMEs (NSS, IS/IH, FP, Env, etc.); all other TQP participants (e.g. Waste Management, etc.) are required to complete CT and professional development as determined by their management.

- OSQS is completed. Some JSQSs have been developed: Transuranic Waste Program Manager, and Explosive Safety Specialist); evaluating other areas that may require JSQS development.
  - **EM-Hanford Order Implementation – Dimple Patel**
    - Assigning CT in eTQP, and providing training to staff on eTQP procedures.
    - 80 CT hours over 5-year period is achievable via other formal training courses, self-study of changes applicable to directives, and attendance at preapproved conferences; we are allowing employees to take credit for local training that is done at staff meetings or presented by the contractor.
    - Updated our TQP Procedure to the Order.
    - We have a general Hanford OSQS that could be used to create an OSQS based on assigned facilities/systems, such as an SSO OSQS. Currently no JSQSs but discussing options (possibly for WTP Chemical Safety Management Program, which is like the Nuclear Safety Process, but specifically for chemicals).
    - Would appreciate written guidance for developing JSQSs or OSQSs, such as a flow chart or step-by-step instruction. We would like the CTT step-by-step instruction incorporated into the eTQP help guide.
3. **Order Implementation and Questionnaire Comments / Day One Recap – Al MacDougall/Karen Boardman**
- FTCP Support Office Website is in development and will contain tools needed, such as OSQS site/facility development guidance, and examples for sharing; JSQS development guidance, and examples for sharing. (See Parking Lot Topics for March Meeting).
  - Primary technical qualifications assigned in the PEQ should be maintained in CT once initial qualification is achieved.
  - A poll was taken by Ms. Boardman and all are satisfied with the current Order 426.1B; no changes, deletions or additions are necessary.
4. **Parking Lot discussion topics to be covered during the March monthly meeting on 3/17/2021**
- Guidance on how to format and present Knowledge Transfer training materials:
    - Need to discuss how taking the training will be documented for both initial and continuing training. Also, if they are later converted to eLearning format will the training need to be taken again.
  - The FTCP support office is putting together an initial set of Questions and Answers to address this and other topics as they come up. Engagement of the Panel as a whole in supporting the overall FAQs transformation efforts is needed, in particular taking a more active role in leading FAQs and PSQS developments and revisions.
  - Leveraging other DOE Communities for training in other areas, to use for Continuing Training Program:
    - Start by requesting a list of other continuing training available from these other communities, such as the Project Management Training and Qualification Program
  - OSQS Development and Implementation Guidance:
    - NTC will develop guidelines after we receive a few more examples of OSQSs from other sites.
    - The FTCP Support Office website, currently in development will house these types of tools.

5. Draft Decision Paper 2021-01, Allowable Extension of Initial Qualification Timeline-Final

- A poll was taken by Ms. Boardman to add a 6-month extension to the existing 18 months, for a total of 24 months for qualification completions; this will not serve as a blanket extension, but will provide flexibility to the TQP participants and will still be approved by the supervisors. All FTCP Agents agreed with this Decision Paper and it was signed and sent out.
- FTCP Decision Papers are found here: <https://www.energy.gov/ehss/worker-health-safety-policy-guidance-reports/federal-technical-capability-program-ftcp/ftcp-1>.

6. NTC Updates – Al MacDougall

- The NTC will create video presentation to serve as “Just-In-Time training” as well as refresher training.
  - Just-In-Time training: capture a SME speaking, develop the learning objectives, have a visual flowchart, etc.

**ACTION:** Al will get together with Jeff Roberson to prioritize a list of potential training topics that may be suitable for knowledge transfer materials.

=====

1. **DAY TWO** – Welcome, recap of yesterday/upcoming today – Karen Boardman

2. Learning Nucleus Updates – Karen Boardman/Melissa Otero

- High-level overview: Melissa is working with Powertrain on the Mandatory Technical Training module for Enterprise-wide.
- Aggressively developing a Test Plan that captures all of the Order requirements, as well as the elements that already exist in eTQP.

**ACTION-All:** Need high-level beta testers please. Contact Melissa Otero if you are interested.

3. LN Demo:

- Melissa demonstrated the screens that they are trying to replicate from eTQP functionality.
  - Dashboard icons – will have a different look when completed.
  - Elevated dashboards – will be assigned to all TQP Coordinators and approving officials.
  - Functions explained: cohort creation, editing profile information and descriptions, add competencies, set conditions (assign courses, upload documents), ability to set different approvers; reminder notification, qualification status (pending, coming due and overdue, which utilizes a color-coding system similar to mandatory training requirements).
  - Additional capabilities are planned, such as directly linking training to competencies.
  - A reporting capability is forthcoming as well.
- John Walsh, HC, Director for the Office of Talent Management:
  - Support employee development and work with PM, NTC, FTCP and all others.
  - Vision: working to identify gaps in learning development; envision something that works for mandated requirements and supports the needs of contractors and the federal workforce.
  - Conducting outreach with the training manager community; we are expanding our capabilities and have started virtual meetings as well as a new newsletter.
  - We are currently migrating the Power Marketing Administration to get their information moved to the LN.
  - Adding career development functionality for mentors/mentees; encourage you to explore that and make it part of your toolbox.

- Karen noted: This partnership is vital to better support the DOE Community.
  - One issue we struggle with is reaching out to the federal and contractor POCs regarding training and NTC training; need Federal support to update our contact lists.
  - Another issue we struggle with is to get Federal support in identifying Federal staff who have approval authority for contractors to be added in the LN, and to update that list as well; all contractors must have a Federal sponsor to be added in the LN.
- John said that they have done batches of user profiles and he will see if they can do groupings for sponsors also.

**ACTION:** Karen and John will discuss further and as the FTCP group to come up with clean lists (TBD).

- John continued: There is an information gap – which training liaison supports which contractors; to expand their role and give them permissions to be able to approve; right now, it is based on Org Code, and that data is not always available for contractors. Need to close this information gap while pushing for accurate and efficiently inputted data to maintain consistency and integrity.
- Approvers/Advocate of contractors must be Federal. A Federal employee must sign off that the contractor has a business need to be in the LN system.

#### 4. Demo 2

- Melissa worked with Debbie Sheldahl on the production site on the LN to implement some new TQP features:
  - How to navigate to the NTC homepage/courses, or TQP homepage.
  - The new TQP Overview video is now on the production side of the LN. TQP Participants are encouraged to watch the video and fill out the Acknowledgement. Then, you will receive a Certificate of Completion that will also be reflected in your transcript.

#### 5. S&S Presentation – MC&A PSQS Implementation – Amy Whitworth, NA-712

- Steve Guerrero welcomed and introduced Amy Whitworth to the group.
  - Amy's presentation MC&A Enterprise Technical Qualification Program Pilot was brought up on the screen and also sent to all post meeting.
  - Pilot course based off of new requirements; collaboration and great support received; gaps identified from comprehensive review; focus was for Federal staff, but tied to contractor needs and NTC training.
  - Through this program, individuals will receive training to meet knowledge objectives and demonstrate proficiency in mandatory performance activities for assigned MC&A functions.
  - Based on functions, a qualification card will be developed for each individual that identifies the courses they will be required to complete.
- Group comments: You've created a pipeline for MC&A people – what we are doing to create pipelines for STSMs and FRs, etc. Great model to use!

#### 6. eTQP Updates – Walter Meeks

- Data migration from eTQP to the LN; data must be as clean as possible prior to migration; (*eTQP Review Checklist for cleanup was sent to all*).
  - Cleanup should include moving a retiree to "Archive", so that the record is not lost; if you need to archive someone's record, contact the NTC to place them into the proper archive folder.
  - We encourage the TQP Coordinators and anyone needing assistance to call or email the FTCP Support Office/Melissa/Walt for assistance:

- [FTCPsupport@ntc.doe.gov](mailto:FTCPsupport@ntc.doe.gov); [motero@ntc.doe.gov](mailto:motero@ntc.doe.gov), Office 505-845-6651; [wmeeks@ntc.doe.gov](mailto:wmeeks@ntc.doe.gov), Office: 505-845-2230.
- The checklist was brought up on the screen and questions were answered.
- The complete migration of eTQP into the LN may still not happen for a few more months while LN programmers are working on the development issues and address the test plan recommendations.

7. Applied Engineering Fundamentals Course Pilot Delivery Update/Status – Doug Eddy

- Doug's presentation *FTCP Applied Eng. Fundamentals Course Status* was brought up on the screen and also sent to all post meeting.
  - Course Development Team: Doug Eddy, Jim Todd, Deepa Khatri, Tim Henderson.
  - 15 Lessons have been developed and peer reviews conducted have provided excellent feedback.
  - Webex dry runs for 11 lessons have been conducted and more to be scheduled.
  - Path forward: complete development of Session 2 Lessons with a goal of offering the course in 4th quarter this calendar year.

8. PSQS Implementation Update – Al MacDougall

- Aviation Safety, TPM, S&S, WQA info recapped; completed PSQs are on the FTCP Website.
  - There is no requirement that folks who were in it before, don't need to requal: use a gap card or baseline them and add their experience for transportability / CT.
  - NNSA will develop the gap card for WQA.
  - For S&S, Cybersecurity comes out of the OCIO, and that Office has new leadership recently. We can try to reengage them, but for now we are not including Cybersecurity into the S&S PSQS (to be a topic for future FTCP monthly meeting).
  - DOE O 470.4B still in draft; we added language to the draft Order that anyone under the 080 and found appropriate by their supervisors, must go through the S&S PSQS.
  - The plan was to get the S&S PSQS out first and have the implementation going on, then develop a FAQs like STSM for Security Managers; there is a need for ODFSA; there is not a current standardized approach.
  - The NTC is looking into folks who can support; we have the structure that we can build out; looking for best approach – like NELT or ODFSA build out.

**ACTION:** Karen, Melissa, Steve Guerrero, and Michelle Barboa will work on a questionnaire for the group to determine a target audience. A problem is that each program office assigns differently.

- PSQS Implementation continued:
  - Option 1: address with a specific JSQS
  - Option2: address with Gap cards; specific training activity and assign in eTQP
  - Option 3: Legacy qual – assign new qual card
- SSO FAQs: the working group is comfortable with it and will get it out for a RevCom review.
  - No need for an additional working group meeting tomorrow or any additional discussions.

9. Day 2 Wrap Up and Closeout – Karen Boardman

- We will prioritize and move forward on these initiatives and address the parking lot items at the next meeting, to be held on March 17. Sincerely appreciate everything you do and have a great rest of your week.

ATTACHMENTS (all were sent out post-meeting and posted on the FTCP website):

- eTQP Review Checklist
- FTCP Decision Paper 2021-01, Allowable Extension of Initial Qualification Timeline-Final
- Amy Whitworth's presentation - *MC&A Enterprise Technical Qualification Program Pilot*
- Doug Eddy's presentation - *FTCP Applied Eng. Fundamentals Course Status*
- Monthly Webex Meeting Agenda for March 17, 2021

LINKS to pertinent info:

- Link to FTCP FAQs STDS and PSQs: <https://www.energy.gov/ehss/worker-health-safety-policy-guidance-reports/federal-technical-capability-program-ftcp-5>.
- Link to FTCP Site Specific: <https://www.energy.gov/ehss/worker-health-safety-policy-guidance-reports/federal-technical-capability-program-ftcp/ftcp-2>.
- FTCP Decision Papers are found here: <https://www.energy.gov/ehss/worker-health-safety-policy-guidance-reports/federal-technical-capability-program-ftcp/ftcp-1>.
- GTB current audio evaluation guides are located on the NTC website under Student/Safety Training Program/Technical Qualification Program: <https://ntc.doe.gov/student/stp/techqualprogram>.
  - Scroll down to General Technical Base and click on it.
  - Under **Supporting Materials, Select GTB Evaluation**. The Audio Files will open and play.