




Quality Assurance Procedure		CP-00-9018-01
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## 1.0 POLICY/PURPOSE

SBAR employs Training Plans as a tool to document and coordinate training requirements within the corporation. Plans are developed on an annual basis for each operating department.

## 2.0 SCOPE

This procedure applies to all SBAR operating units

## 3.0 REFERENCES AND DEFINITIONS

### 3.1 References

*ISO 9001: Quality Management Systems-Requirements, Third Edition (2000-12-15)*

*ISO 9001, 6.2.2: Competence, Awareness, and Training*

#### SBAR Documents

- SBAR *Quality Manual(QAP 2000)*
- SBAR *Employee Performance Appraisals and Training Assessments(CP-00-2000-02)*
- SBAR *Training Procedure(CP-00-9018)*
- SBAR *Control of Quality Records Procedure (CP-00-9016)*

### 3.2 Definitions

**Desirable (training category):** Training courses identified in an employee training assessment that will enhance the company's ability to a) accomplish a new service area or b) support anticipated growth or increased operational capability.

**Functional Area Manager (FAM):** A senior supervisory individual who is responsible for the leadership, direction, and overall success of an area of the company, such as procurement, specific contracts, logistics, training, quality, safety, engineering, finance, etc.

**Long Term Need (training category):** Training courses identified in an employee training assessment that is essential to the long-term development of a manager in a key management, a supervisor or critical skill position that may be anticipated under the contract due to changing technological requirements.

**Management Development (training category):** Training courses identified in an employee training assessment that is essential to the near-term of a manager in a key management or supervisory position.


**Mission Critical (training category):** Training courses identified on an employee training assessment without which, the employee a) cannot accomplish a function that is required under a contract, or b) will affect the quality of the service or product the company provides to a customer.

**Record:** Document/data that furnishes objective evidence of activities performed or results achieved. Records provide objective evidence of the fulfillment of specified requirements.

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Records include, but are not limited to, procedures, inspection reports, training records, drawings, etc.

**Training:** Instruction and/or applied exercises for the attainment and retention of knowledge, skills, and attitudes.

#### 4.0 RESPONSIBILITIES

##### 4.1 Corporate Quality Manager

The Corporate Quality Manager is responsible for verification that this procedure is implemented.

##### 4.2 Executive/Division Vice President

Reviews and approves Training Plans and associated training budgets.

##### 4.3 Area General Manager

Reviews and directs implementation of Training Plans in accordance with established operating budget and appoints a Training Coordinator for each Department.

##### 4.4 Department Training Coordinator

Training Coordinators:

- Compile and maintain the Department Training Plan.
- Coordinate and schedule all training classes.
- Coordinates with Human Resources to ensure that Personnel Master file are maintained.

(NOTE: Department Training Coordinators are assigned to each contract (e.g., LO&SC) or office (e.g., Ventura, San Diego).

##### 4.5 Human Resources

Human Resources:

- Maintain Training Records with copies of all completed training, certification and education courses with the employee master file.
- Maintain a corporate master file of all division Training Plans
- Assist Training Coordinators in identifying required and approved training courses.

##### 4.6 Corporate Functional Area Managers (FAMs)

FAMs compile an annual Training Plan based upon the training assessments for the employee's within the FAM's organization.

##### 4.7 Supervisors

Supervisors:

- Identify the training needs of each employee using a training assessment form.

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- Provide input to the FAM in the compilation of the annual training plan.

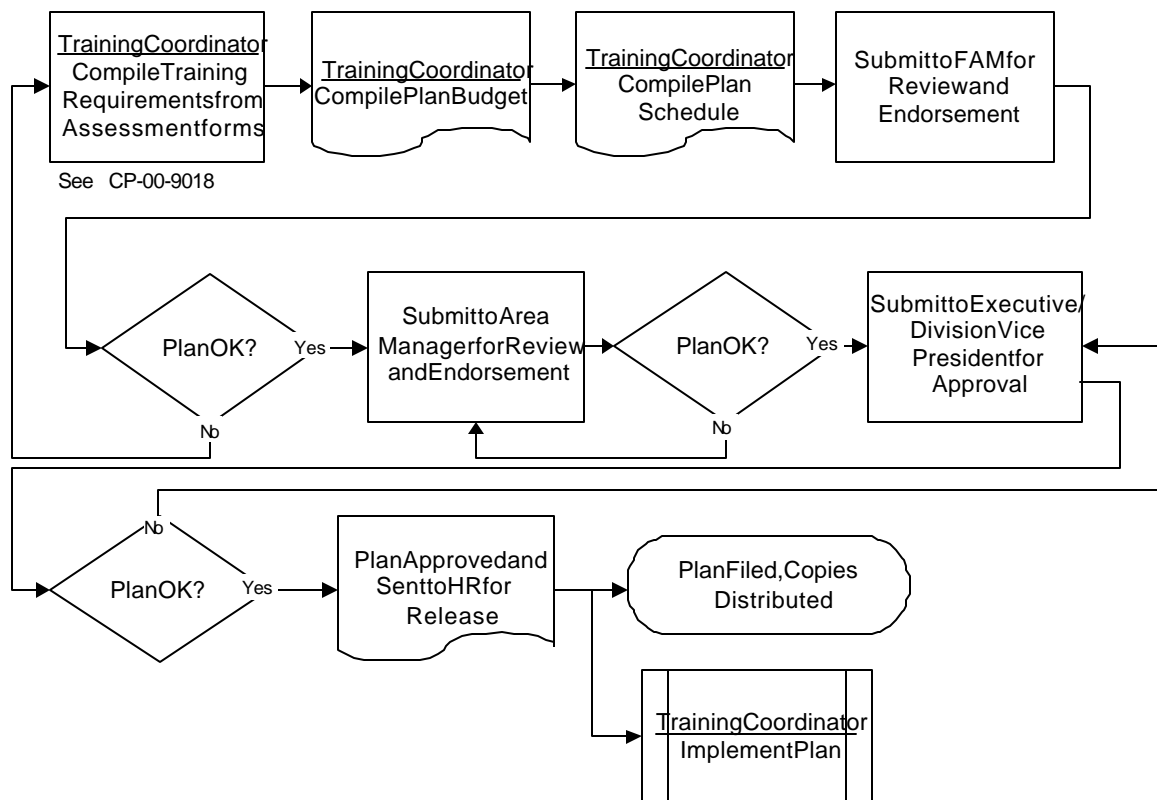
#### 4.8 Employees

Each SBAR employee:

- Notifies their appropriate supervisor of training that may be necessary to fulfill the duties of their position or profession.
- Informs their supervisor of available training that is designed to improve their level of work quality or professional development.

#### 5.0 REQUIREMENTS/PROCEDURES


**FIGURE 1 – TRAINING PLAN DEVELOPMENT**



#### 5.1 General

The Department Training Plan forms an essential element in budgeting training resources and in planning indirect rates. Without the plan, it is not possible to establish operating budgets and ensure that the company receives the best value for its training dollar. Figure 1 presents the process for development of department training plans. Requirements for the plans are discussed in Paragraph 5.2 below.



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## 5.2 Training Plan Preparation

Training Plans are developed no later than 30 October each year and are developed from employee Training Assessments which are completed by 30 September each year. Further, respective Department Training Coordinators compile the Training Plans.

### 5.2.1 Training Plan Content

The training plan consists of the following three parts:

- Cover/Signature Page
- Training Budget Sheet
- Training Assessment Appendix

A sample Training Plan is presented in the Example [CP-00-9018-01-A](#).

#### 5.2.1.1 Training Budget Compilation

[Form CP-00-9018-01-B](#) presents the spreadsheet format that is used to compile the training budget. As indicated in the form, costs are to be compiled by Department in ascending order. The data contained in the compilation is derived from the individual assessment forms developed during the performance appraisal process for each employee found to be in need of training to support a mission critical skill, or requiring management development training. Include all long term needs and desirable training identified in the assessment. Do not include the Initial Mandatory or Recurring Training in CP-00-9018, which must be routinely performed. The Training Coordinator or the FAMS for quality, safety, and environmental track these requirements independently. Costs are totaled at the bottom of the spreadsheet for the four categories identified in the assessment i.e., Mission Critical, Management Development, Long Term Need and Desirable.

#### 5.2.1.2 Training Budget and Cost Recovery

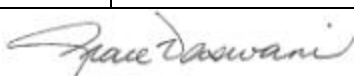
Unless constrained by contract requirements, training budgets are incorporated into the Department Indirect budgets and implemented based upon the following guidance provided in Table 1.

#### 5.2.1.3 Training Assessment Appendix

Each plan contains a compilation of the training assessments ([Form CP-00-9018-A](#)) provided from the performance appraisal process. The forms provided, in Appendix A, are in alphabetical order by employee name (last name first).

## 5.3 Records

Human Resources retains copies of all approved Training Plans for a period of 36 months from plan inception. The training plans are maintained in the personnel file and controlled in accordance with SBAR *Control of Quality Records Procedure* and SBAR *Training Procedure*.

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**Table 1 – Cost Recovery of Training**

<b>Mission Critical Training</b>	For Government Contracts - Cost should be recovered as an allowable Other Direct Cost in accordance with the FAR.	A formal written request should be forwarded to the Contracting Officer prior to scheduling the training.
	For Government Contracts – When the contract or the Contracting Officer declines to fund as an Other Direct Cost.	Training is charged to the appropriate Department Overhead, after approval of the Training Plan.
	Work performed on non-government contracts	
<b>Management Development Training</b>		Training is charged to the appropriate Department Overhead, after approval of the Training Plan.
<b>Long-Term Need</b>	For Government Contracts – If in response to evolving technological requirements, Cost should be recovered as an allowable Other Direct Cost in accordance with the FAR.	A formal written request should be forwarded to the Contracting Officer prior to scheduling the training.
	For Government Contracts – If in response to evolving technological requirements, and the contract or the Contracting Officer declines to fund as an Other Direct Cost.	Training is charged to the appropriate Department Overhead, after approval of the Training Plan. Revision of the Plan to show a change from ODC to Indirect is required.
	If in response to evolving technological requirements for work performed on non-government contracts	Training is charged to the appropriate Department Overhead, after approval of the Training Plan.
	If for other than evolving technological requirements	
<b>Desirable Training</b>		Training is accomplished from unused or leftover funds available within an established Department Overhead pool


#### 5.4 Plan Review and Approval

Review and approval of Training Plans are in accordance with Table 2.

**Table 2 – Plan Approval Levels**

	Prepare	Review	Approve
Training Coordinator	♦		
FAM		♦	
Area General Manager		♦	♦
Human Resources Review		♦	
Executive/Division Vice President		♦	♦



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### PREPARATION, REVIEW, AND APPROVAL OFFICIALS

**Prepared By:**

Nancy Johnson  
Human Resources

**Reviewed By:**

R. W. Stone  
Lead Auditor

**Reviewed By:**

M.T. Schmoll  
Director Corporate Programs

**Approved By:**

Grace Vaswani  
President

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