

# **HCR 98 Committee Report**

to the

**Indiana Utility Regulatory Commission**

BY THE HCR 98 COMMITTEE

DECEMBER 13, 2002

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## **Introduction**

The 2001 Session of the Indiana General Assembly passed House Concurrent Resolution 98 (HCR 98) urging the Indiana Utility Regulatory Commission (IURC) to establish a committee to recommend minimum standardized skill and training standards for employees who operate or maintain electric utilities in Indiana. The resolution further urges the Commission to adopt rules based on the recommendations of the committee. HCR 98 was authored by Representative Tiny Adams and sponsored by Senator Allie Craycraft. A complete copy of the resolution is attached in Appendix A.

Under the terms of the resolution, the IURC appointed ten individuals to serve on the Committee. Indiana Utility Consumer Counselor Anne E. Becker, as chair, convened the Committee. The Committee membership is attached in Appendix B.

The HCR 98 Committee (“Committee”) met seven times in its effort to formulate and adopt recommendations on minimum standardized skill and training standards for Indiana electric utility employees. The Committee’s meeting minutes are attached in Appendix C.

As specified in the HCR 98, this document serves as the Committee’s Report to the IURC. This Report also summarizes the results of the Committee’s discussions on the impact of worker qualifications and training on electric utility reliability and safety.

## **General Discussion and Issues**

The Committee initially focused on defining its role and the scope of its task. Areas of agreement include:

- the importance of electric utility reliability and safety;
- the importance of existing OSHA 1910.269 safety rules;
- existing electric utility apprenticeship training programs work well;
- ground rules for conducting its work; and
- a focus on five job classifications (lineman, substation mechanic, SCADA/relaying specialist, electronic metering specialist, and generating station unit operator) given the large number of potential positions and the variety of names and classifications used by Indiana electric utilities.

Over the course of the Committee’s deliberations, it became clear that there are a number of areas of disagreement. The two major issues of disagreement are:

- the applicability of minimum qualification and training standards to contractors working on Indiana utility property; and
- whether the U.S. Department of Labor, Bureau of Apprenticeship and Training's certification should be required for all Indiana electric utility training programs.

Committee members raised a number of concerns and asked a number of questions during the course of their discussions. These include:

- the burden that IURC minimum standards may place on small municipal electric utilities;
- the applicability of IURC minimum standards to electric utilities that are withdrawn from its jurisdiction;
- the ability to enforce IURC minimum standards and OSHA standards;
- adequate electric utility staffing;
- adequate electric utility maintenance expenditures;
- use of contractors by electric utilities;
- whether a state license should be required to work on electric utility property; and
- if there is a gap in existing training that requires new, minimum standards.

Finally, the Committee received information from, and engaged in discussions with three guests. Greg Collins of the US Department of Labor provided information on the Department's Bureau of Apprenticeship and Training (BAT) program. Gayvin Strantz with the Indiana Statewide Association of Rural Electric Cooperatives provided information on the Rural Electric Apprenticeship Program (REAP). Bob Richhart of Hoosier Energy provided information on the Hoosier Energy Apprentice Training and Safety program (HEATS). Handouts from these guests are included in Appendix D.

## Recommendation

The Committee agreed by an 8-2 vote (Sampson and Creech voting nay) to make the following recommendation to the IURC.

### Minimum Qualifications for Entry Into Certain Electric Utility Positions<sup>1</sup>

It is proposed that Indiana electric utility company management would use these criteria to establish minimum entry-level qualification standards for entry into certain transmission/distribution and generating station positions, as referenced below. The intent here is to help ensure that appropriate levels of quality, performance and safety are achieved for the electric system and among utilities. These criteria are proposed as a minimum, and are not intended to prevent company management from establishing or modifying standards beyond the minimum criteria in order to accommodate, for example, advances in technology, or to meet specific needs.

- Criteria would apply to Indiana electric utilities.
- Meeting the criteria would be necessary for entry into the positions described below.
- Positions (as typically referenced in the electric utility industry) for which these standards apply are limited to those with apprenticeship training programs, structured on-the-job training, or operating lines of progression for becoming a lineman, substation mechanic, SCADA/relaying specialist, electronic metering specialist, or generating station unit operator.

The minimum standardized skills required for entry into these positions include:

1. Possession of a high school diploma or GED equivalency certificate.
2. Performance at an acceptable level on a battery of screening tests, using either test content developed specifically for the position by individual companies, or using appropriate tests available from electric utility industry groups such as the Electric Power Research Institute or the Edison Electric Institute.  
Additional test battery criteria include:

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<sup>1</sup> This proposal, written for discussion purposes, consists of a series of bullet points for ease in review by the HCR 98 Committee.

- Proper validation for the particular position for which the test battery would be used.
- Test battery content may be different for different positions.
- Acceptable level of performance to be established for each position.
- Meet legal requirements for testing practice.
- Written and/or multiple-choice questions, administered in a confidential, timed, classroom environment consistent with the specific test's validation criteria.
- A set of topics for each test battery that is appropriate for the position, designed to measure the candidate's ability to absorb training and become successful in the position, for example, but not limited to: reading comprehension, graphic arithmetic, mechanical concepts, mathematical usage, spatial ability, and reading tables and graphs.
- Capable of being administered by the utility company on its premises, or by a local school testing facility such as Ivy Tech, or by other appropriate institutions.
- Capable of being audited, and having general information on test performance provided on an individual basis.

## Minimum Training Standards

Over the course of the meetings, the Committee reviewed, discussed and modified a number of proposed minimum training standards. However, Committee members were at impasse on two issues:

- the use of U.S. Department of Labor, Bureau of Apprenticeship Training (BAT) standards as a guideline or a requirement and,
- the applicability of any minimum utility training standards to contractors working on utility systems.

While acknowledging the impasse, the Committee desired to highlight the points on which there was agreement, chiefly:

- the general need for minimum training standards; and
- the importance of, and utility accountability for, reliability and safety.

Finally, given the areas of disagreement noted above, the Committee agreed to provide summary statements on the issues directly to the Commission as a part of this report.<sup>2</sup>

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<sup>2</sup> The statements provided herein were drafted solely by the Committee's Labor and Management representatives respectively.

## **Summary Statement of Labor Representatives**

HCR 98 directs this Committee to recommend to the Indiana Utility Regulatory Commission (“IURC” or the “Commission”) minimum skill and training standards for workers who operate or maintain the electric utility system in Indiana. The Committee’s members are in general agreement regarding the need for such standards. It is clear that minimum skill and training standards are necessary to safeguard the life, health, and public welfare of the citizens of the State of Indiana. Skill and training standards are also needed to ensure the reliability of the electricity generation, transmission and distribution systems and to ensure the safety, effectiveness, and productivity of workers who are entrusted to perform work on these systems. The Committee’s differences go to the form that minimum skill and training standards should take. The Labor Representatives of the Committee hereby submit this summary statement as their recommendations to the IURC.

### **Recommendations**

Minimum skill and training standards must apply to every worker who installs, operates, maintains, services or repairs any or all parts of the electric generation, transmission and distribution system in Indiana, including facilities, materials and equipment. Furthermore, the standards must apply to every public utility and company that operates, repairs or maintains the electric system in Indiana, and each such utility and company must be responsible for ensuring that any person working on the system at their facilities or properties is in compliance with the standards. Reliability, safety and worker productivity will suffer if the standards are applicable to only a portion of the workers and companies that perform these services.

As to the standards themselves, the Labor Representatives are in agreement that Proposal No. 1 adopted by the Committee at its October 17, 2002 meeting represents a starting point for the skill and training standards ultimately promulgated by the IURC. However, the proposal is only a starting point in that it does not address the full range of positions and/or job tasks that are involved in operating and maintaining the electric system. The Committee’s discussion was limited to the five positions identified in that proposal for the purpose of making the work of the Committee more manageable. The proposal itself represents areas of agreement among the Committee members, but does not include other provisions that the Labor Representatives to the Committee believe are critical to ensure the safety and reliability of the electric system.

In particular, the proposal is silent regarding the need for involvement of the United States Department of Labor’s Bureau of Apprenticeship and Training (“BAT”) in any skill and training standards adopted by the IURC. Utilities and companies in the business of providing electricity should be required to consult with the BAT in the development of training programs, and obtain certification of those programs from the BAT. Requiring BAT certification is a means by which the IURC can be assured that



the utilities and companies are providing adequate training to the persons working on the electric system. Apprenticeship and training programs that are registered with the BAT and the “work processes” that provide the basis for the development of such programs are the minimum, nationwide, standardized requirements that meet the demands of employers and workers. Apprenticeship programs are a proven strategy that ensure quality training by combining on-the-job training with related theoretical and practical classroom instruction. The BAT, more so than any other entity or government agency, is familiar with the training that workers need in order to provide consistent, safe, and reliable job performance.

In working with employers to develop apprenticeship programs, the BAT does not dictate the program. Rather, the BAT acts as a consultant and allows employers to gear the training and skills relative to the needs of their employees and business. The BAT consults “work processes” for various jobs, which are national training standards, in performing this work. These “work processes” are guidelines that assist the BAT in ensuring the quality of the particular training program; however, they are flexible and are used as a guide to support development of the employer’s program. Ultimately, a program is developed and approved that ensures the classroom and on-the-job training necessary for an apprentice to become a skilled journeyman. Once a program is approved, the BAT maintains a regulatory role to ascertain whether the program is operating in an appropriate and effective manner.

Historically, the lineman position is the primary job classification in the utility industry that has benefited from BAT-approved apprenticeship programs. The Committee heard presentations from representatives of the BAT, the Hoosier Energy Apprenticeship Training Program (“HEATS”), and the Rural Energy Apprenticeship Program (“REAP”). These joint labor-management apprenticeship programs for linemen have proven effective in providing high-quality, well-trained workers for the utilities.

In short, an essential component of any minimum skill and training standard promulgated by the IURC should be that any utility or company covered by the standard must submit its training program to the BAT for certification. Each such public utility or company must also be responsible for ensuring that any person performing work meets the minimum skill and training standard and that the person is either in training or has completed training in a jointly-administered BAT-approved apprenticeship program that contains standards that equal or exceed any skill and training standard adopted by the IURC.

The costs of such a requirement are negligible when compared to the benefits that will be reaped. Bob Richhart of the HEATS program stated that the cost of training a lineman is \$1,800.00 per year in his BAT-approved program. At the end of this four-year program and for a total cost of \$7,200.00, the worker is a well-trained journeyman with an associates degree from Indiana Vocational Institute of Technology. In addition to the improved reliability and safety of the electric system, the benefits of such a requirement to the public, employers, and workers include:

1. Skilled workers who trained to industry and employer specifications.
2. Cost savings resulting from increased worker productivity and lower workers' compensation premiums due to an emphasis on safety.
3. Potential for higher paying jobs and improved quality of life for workers with skills versatility.
4. Lessened need for Indiana to import skilled workers.
5. Employers provided with a pipeline for the recruitment and retention of high-quality workers.

Moreover, it is reasonable to expect that most companies who now employ workers who work on the electric system would have little difficulty in having their existing training programs approved by the BAT as a qualified jointly-administered apprenticeship program. Therefore, most public utilities and companies providing such workers will not be required to substantially rework their existing programs in order to meet BAT standards. Yet, once the programs are certified by the BAT, the IURC can be confident that the programs are producing high-quality, well-trained workers who will adequately build, operate and service this critical piece of the State's infrastructure.

As to current employees with a history of service on the electric system, these employees may not need to complete the entire apprenticeship program. Instead, it would be sufficient to require that any such employee be reviewed by the BAT master committee to determine their qualifications. If the BAT deems the person to have insufficient qualifications, then such person shall be required to complete only the necessary hours of classroom and related training within a reasonable amount of time.

At the moment there are simply not adequate standards that require minimum skill and training standards. The Committee was presented with information regarding OSHA standards relating to workers on electric generation, transmission, and distributions systems. These standards, although important, do not require a set of minimum skills. OSHA demands that employees be "qualified", but does not define the term. OSHA inspectors, who generally react to problems rather than act proactively because of staffing deficiencies, are not in a position to determine whether employees are "qualified" where there are no standards for making that determination.

HCR 98 specifically urges the IURC to adopt rules based upon the recommendations of this Committee. Therefore, the Labor Representatives of the Committee respectfully request that the IURC establish a rule making procedure through which it will adopt the recommendations contained in this summary statement as administrative rules of the Commission. This recommendation assumes the IURC shall have the sole source power of enforcement to ensure these skill standards are established and actively maintained by each utility operating in the state of Indiana, in their interest of maintaining consumer and worker safety and service reliability.

## **Summary Statement of Management Representatives**

The purpose of this position paper is to respond to a request from the chair of the HCR98 Committee, Ms. Anne Becker. The chair requested that both labor and management representatives each as a group, offer final written remarks summarizing their collective position on any issues discussed by the committee. Utility management members on the committee represent Indiana's investor owned utilities, municipal and cooperative jurisdictions and independent power producers (including industrial producers). Throughout these comments the interests of these members will be broadly reflected in the terms "utility" or "utilities."

Indiana utilities are committed to and heavily invested in effective apprenticeship and other formal training programs. Without question, these training and qualification programs form a cornerstone of the safety and reliability foundation. The current utility programs result from many years of operational and training experience, working with a skilled labor force. These programs reflect a consistent and long-term investment in reliability and safety. The overall safety and reliability performance of Indiana utilities are reflected in part by the effectiveness of these training programs.

It should be noted that at no time during the HCR98 committee deliberations were the quality or effectiveness of existing utility training programs questioned. On numerous occasions, the existing programs were cited as examples of top programs by both labor and management representatives. These programs include apprenticeship programs sponsored by individual investor-owned utilities and combined programs (Hoosier Energy Apprenticeship Training and Safety and Rural Electric Apprenticeship Programs).

HCR98 suggests work quality, safety and productivity will be improved through standardized minimum training. However, this suggestion may conflict with the actual results achieved through existing individualized utility programs, which are endorsed by the same resolution. The resolution states in part, that current electric utility apprenticeship programs "have provided Indiana highly skilled labor, quality workmanship and improved worker safety." The utilities agree with this conclusion. Existing programs are successful because they are tailored to the specific business, safety and customer drivers of each utility and its workforce makeup.

The utility management members disagree that mandated standardized training for all workers, including contractors, will necessarily lead to further improvements in quality, safety and productivity. We have learned that safety and reliability are achieved through a careful balance of a number of factors such as supervision, accountability, training and an experienced and skilled workforce. In fact, there are a number of highly effective programs and tools available to develop and maintain appropriate levels of training and qualifications. For example, various apprenticeship programs, OSHA Standards, the Electric Power Research Institute, the Edison Electric Institute, the National Institute for the Uniform Licensing of Power Engineers, and the American Society of Mechanical Engineers along with many others, are all sources of effective

models and approaches to training and qualification. The key is to use the resources and approaches that most closely align to and benefit user, customer, safety and business needs. This requires flexibility, not mandated minimum standards.

Adapting existing programs to incorporate mandatory minimum standards will be costly and may distract from effective implementation of current programs. Further, it has not been shown that implementing minimum standards will necessarily improve the effectiveness of existing training programs. The added standards, if applied beyond utility employees, will also discourage otherwise fully qualified contractors and, as a result, could add unnecessary costs to customers at public, municipal, and cooperative utilities, and also will add unnecessary direct costs to industrial and independent power producers, without clear benefit.

Contractors often perform valuable services to utilities providing cost-effective alternatives to accomplish routine work when it is not prudent to deploy specialized or more highly qualified utility personnel. In addition, contractors often respond to peak or seasonal workloads and emergent needs that exceed the capacity of internal resources. For example, storm restorations are frequently improved through the use of contractors. In these cases, if ample numbers of experienced, qualified contractors were not available, reliable service and public safety would be negatively impacted. Further, storm restoration mutual aid programs with utilities from other states could be hampered by training mandates peculiar to Indiana.

Contractors also employ training programs appropriate for their workforces. Industry data does not reveal trends that the use of contracted services compromises quality, safety or reliability. The ability to use contractors is also important to the efficient operation of independent and industrial power producers, which typically employ a core group of multi-tasked workers for day-to-day operation and maintenance, and then rely heavily on the use of selected contractors for other work projects. HCR98 should not discourage the availability of qualified contractors through burdensome and unnecessary training requirements.

Utilities are ultimately responsible for achieving reliability for their electric delivery systems and are accountable to the IURC for the adequacy of service. In doing so, utilities choose the most efficient and cost effective means to achieve these results, including the use of contractors and the choice of training programs. As the utilities understand it, HCR98 is not a legislative mandate providing statutory authority for the IURC to establish minimum training or qualifications for non-utility employees. Existing OSHA regulations mandate minimum training standards for all workers on a national level. Not only are federal requirements satisfied through extensive internal training and apprenticeship programs, these same regulations already apply directly to independent contractors. Often, utilities further ensure that contractors meet these OSHA requirements through their commercial contracts.

Utilities commend the authors of the resolution and the efforts of the committee to develop meaningful minimum training and qualification standards. At the same time,

the utility management members do not support further recommendations for specific mandated training standards by the committee for the reasons stated above. In addition, the committee was not able to identify any data or objective results that show a causal relationship between reliability, safety or productivity and specific, mandated training certification programs. We are concerned that extending these requirements to utility employees and contractors will increase the cost of service to consumers and discourage qualified contractors from supporting critical utility functions.

Utilities strongly favor the use of apprenticeship and other formal training programs consistent with and tailored to utility business practices, customer needs, and workforce makeup, in order to provide safe and reliable service to customers.

## **Appendix A**

### **House Concurrent Resolution 98**

**HOUSE CONCURRENT  
RESOLUTION No. 98**

Adams T

First Regular Session 112th General Assembly (2001)

A CONCURRENT RESOLUTION urging the Indiana utility regulatory commission to establish a committee to recommend minimum standardized skill and training standards for employees who operate or maintain electric utilities in Indiana and urging the commission to adopt rules based on the recommendations of the committee.

Whereas, Apprenticeship programs established for other segments of the electric utility workforce have provided Indiana with highly skilled labor, quality workmanship, and improved worker safety;

Whereas, The establishment of minimum standardized skill and training standards for employees who operate or maintain electric utilities may improve the quality, effectiveness, and continued viability of Indiana's workforce;

Whereas, The establishment of minimum standardized skill and training standards for employees who operate or maintain electric utilities may increase worker productivity;

Whereas, The establishment of minimum standardized skill and training standards for employees who operate or maintain electric utilities may improve the reliability of Indiana's electric system: Therefore,

Be it resolved by the House of Representatives  
of the General Assembly of the State of Indiana,  
the Senate concurring:

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SECTION 1. That the Indiana utility regulatory commission is urged to establish a committee to recommend minimum standardized skill and training standards for employees who operate or maintain electric utilities in Indiana.

SECTION 2. That the minimum standardized skill and training standards recommended by the committee, if established, must specify training standards and qualifications for utility employees who operate, maintain, service, and repair any or all parts of electric generation and transmission facilities, materials, or equipment in Indiana.

SECTION 3. That the committee, if established, must consist of the following eleven (11) members:

(1) The utility consumer counselor, who shall serve as the chair of the committee and an ex officio, nonvoting member of the committee. However, the consumer counselor may make a final determination concerning any proposed standards or qualifications not agreed to by a simple majority of the voting members of the committee.

(2) Five (5) members appointed by the commission, with one (1) member

representing management from each of the following:

(A) A public utility (as defined in IC 8-1-2-1) that produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public.

(B) A rural electric membership corporation (as defined in IC 8-1-13).

(C) A municipally owned utility (as defined in IC 8-1-2-1) that produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public.

(D) A public utility that:

(i) produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public; and

(ii) has withdrawn from the commission's jurisdiction under any provision of Indiana law, or over which the commission has declined to exercise jurisdiction under any provision of Indiana law.

(E) A non utility owned electric generation and transmission company.

(3) Five (5) members appointed by the commission, with one (1) member who is a non management person representing the non management employees from each of the following:

(A) A public utility (as defined in IC 8-1-2-1) that produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public.

(B) A rural electric membership corporation (as defined in IC 8-1-13).

(C) A municipally owned utility (as defined in IC 8-1-2-1) that produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public.

(D) A public utility that:

(i) produces, transmits, delivers, or furnishes electricity, either directly or indirectly, to the public; and

(ii) has withdrawn from the commission's jurisdiction under any provision of Indiana law, or over which the commission has declined to exercise jurisdiction under any provision of Indiana law.

(E) A non utility owned electric generation and transmission company.

SECTION 4. That the commission is urged to establish the committee not later than September 1, 2001.

SECTION 5. That the committee, if established, shall issue its recommendations to the commission not later than January 1, 2003.

SECTION 6. That the commission, upon receiving the recommendations of the committee, is urged to adopt rules under IC 4-22-2 based on the committee's recommendations.



## **Appendix B**

### **HCR 98 Committee Membership**

# House Concurrent Resolution 98

## Training Committee (Updated 12/10/02)

### Management

### Non-Management

#### **Public Utility**

John Sampson  
American Electric Power

David Chlebek  
United Steel Workers of America,  
Local #12775

#### **Rural Electric Utility**

Boyd Huff  
Whitewater Valley Rural Electric  
Membership Corporation

Gary Woodall  
International Brotherhood of  
Electrical Workers, Local #1395

#### **Municipally Owned Utility**

Dave Creech  
Crawfordsville Electric Light & Power

Kevin McGann  
International Brotherhood of  
Electrical Workers, Local #1392

#### **Public Utility**

*(i) Withdrawn or (ii) Commission declined jurisdiction*

Kenneth P. Foley  
Northern Indiana Public Service Company

Fred Jones  
International Brotherhood of  
Electrical Workers, Local #1393

#### **Non Utility Owned**

DeWayne Todd  
Aluminum Company of America (ALCOA)

Matt Hemenway  
International Brotherhood of  
Electrical Workers, Local #702

#### **OUCC**

Anne E. Becker  
Indiana Office of Utility Consumer Counselor

## **Appendix C**

### **HCR 98 Committee Meeting Minutes**

# HCR 98 Electric Worker Training Standards Committee

## June 19, 2002 Meeting Minutes

The meeting was called to order at 9:40am.

### **Committee Members Present:**

Anne Becker, Dave Chlebek, Dave Creech, Ken Foley, Matt Hemenway, Boyd Huff, Fred Jones, Kevin McGann, John Sampson, DeWayne Todd, Gary Woodall.

### **Committee Members Absent:**

None.

### **Introductions, Administrative and Miscellaneous Matters:**

Committee members introduced themselves. E-mail addresses were collected and contact information confirmed and corrected as needed to facilitate future communication. The following ground rules were established to guide the committee's work: professional conduct, respect for differences of opinion, opportunity for all to speak uninterrupted and committee ownership of goal with OUCG facilitation. It was agreed that committee members would review meeting minutes, news releases or other communiqués reflecting the committee's work as well as recommendations for electric worker minimum qualifications and training standard before they are final and made public. The meetings of the committee are public meetings and noticed as such.

### **Discussion of Committee's Charge:**

Committee members shared their thoughts and engaged in detailed discussion on the subject of their charge. To summarize:

- A resolution is not a law so the committee is not "legally" required to complete its work. However, the committee has the opportunity to do so in a collaborative fashion as encouraged and empowered by the General Assembly.
- The resolution urges the committee to submit recommendations to the Indiana Utility Regulatory Commission (IURC) by January 1, 2003. The resolution then urges the IURC to use the recommendations as the basis for formal rules on this subject. The IURC rulemaking process is set by law, requires formal public notice, comments and hearings and generally takes a minimum of six months to complete.
- Discussion centered on the following charge from Sections 1 and 2 of HCR 98:
  - Recommend minimum standardized skill and training standards for employees who operate or maintain electric utilities
  - Recommendations must specify (i) training standards and (ii) qualifications for employees who (a) operate, (b) maintain, (c) service and (d) repair any or all parts of the electric (1) generation and (2) transmission facilities, (3) materials or (4) equipment.
- Concern was raised about the burden that required minimum qualifications and training could place on very small municipal electric utilities.
- Concern was raised about worker and public safety if minimum qualifications and training are not required.
- Safety and training requirements that already apply to electric utilities were discussed, including OSHA 1910.269 and U.S. Department of Labor programs.
- Apprenticeship programs were discussed with respect to what they could offer in the development of minimum training standards.
- Jobs/workers covered might include anything from starting a boiler to installing a weatherhead. Would be difficult to develop recommendations by job title as these can vary greatly by utility. Type of work performed may be a more accurate means of categorizing.

### **Other Items:**

Committee members shared their thoughts on progress made in meeting and what would be needed going forward. Existing programs and standards should be reviewed as a starting point and any gaps can

be addressed. Concern was raised about the potential/real impact of deregulation and workforce reductions on reliability and safety should be considered when developing recommendations. Wisconsin's experience with reliability issues was discussed and a packet of information was offered to committee members. May need to meet more than once per month to meet 1/1/03 deadline, may need subcommittees, teleconferences, e-mail sharing. Need to focus on customer(s) in process.

**Next Steps:**

By June 28, 2002 the OUCC will distribute draft meeting minutes of the June 19<sup>th</sup> meeting, an updated contact list and establish e-mail contact with all committee members.

By July 1, 2002 members will submit to Anne Becker their thoughts on:

- the worker population to be covered by the committee's recommendations
- the MQ/TS for that population (and/or each subgroup)
- current gaps in existing MQ/TS for the identified population (and/or each subgroup)

By July 8, 2002 the OUCC will distribute a compilation of the members' individual thoughts to the entire committee in preparation for the next meeting.

Next committee meeting is scheduled for Friday, July 19, 2002 at 9:30am at the OUCC.

The OUCC will invite the author and sponsor of HCR98 to speak to the committee at its next meeting as well as explore the arrangements needed to allow for participation in the committee meetings via conference call when necessary.

The meeting was adjourned at 12:10pm.

## HCR 98 Electric Worker Training Standards Committee

### July 19, 2002 Meeting Minutes

The meeting was called to order at 9:40am.

#### **Committee Members Present:**

Anne Becker, Dave Creech, Ken Foley, Matt Hemenway, Boyd Huff, Fred Jones, Kevin McGann, John Sampson, DeWayne Todd, Gary Woodall.

#### **Committee Members Absent:**

Dave Chlebek.

#### **Approval of Minutes:**

The minutes of the June 19, 2002 meeting were approved with minor revision.

#### **New Business:**

The question of absent members' voting rights was raised. It was noted that the resolution requires no quorum and that a simple majority can carry a motion. The committee agreed to allow participation in meetings, including voting, via telephone. In addition, written and signed or e-mailed proxies will be accepted provided they indicate who holds the proxy.

#### **HCR 98 Sponsor Discussion of Legislative Intent:**

Due to conflicting commitments at the State Budget Committee meeting in Muncie, Sen. Craycraft and Rep. Adams were unable to attend the meeting. Both have indicated interest in being at the August meeting and the OUCC will work to arrange.

#### **Review of Committee's Responses to June 19, 2002 Questions:**

Responses not included in the summary (Jones, Todd and Woodall) were shared with and read by the committee prior to discussion. To summarize the discussion:

- Members attempted to understand the broadness or specificity of the committee's charge and those areas where there was agreement, disagreement or a need for more information. The latter effort was conducted on a marker board in the conference room and is reflected in the "Marker Board Notes" attachment to these minutes.
- Concern was raised by some Committee members that a "gap" in minimum qualifications and training standards exists with respect to contractors working on the state's electric utility system. It was felt by these members that the use of contractors as well as overtime is increasing due to smaller utility workforces, and that all safety rules may not be/are not being followed resulting in impacts on safety and reliability.
- It was noted that contractors are required to meet the same OSHA safety standards and training as utility employees and that it is the joint responsibility of the property owner, contractor and appropriate government agencies to ensure these are met.
- It was noted that reliability issues are generally less affected by worker qualification and training issues than by weather, animal intrusion or equipment failure.
- It was felt by some Committee members that utility workforce reductions/operating decisions were negatively impacting reliability and that OSHA budget cuts were reducing the agency's ability to enforce safety standards; however, no reliability or safety statistics were provided.

#### **Review of Wisconsin Information:**

The origin of the Wisconsin information was discussed, particularly reliability concerns. Following discussion, Fred Jones agreed to identify the specific sections of the information that are particularly relevant to the committee's charge with respect to electric worker minimum qualifications and training standards.

**Discussion and Obtain Consensus of Committee's Charge and Scope: Creation of Subgroups if warranted**

No consensus was obtained as discussion on the subject was postponed until discussion on the subject could be had with the resolution's author and sponsor. The creation of subgroups was discussed, but none were formed at this meeting.

**Establish Regular Meeting of Conference Call Schedule for Duration of 2002**

The committee agreed to meet at 9:30am in the OUCC's large conference room on the following dates through the end of the year: August 21 (Wed.), September 19 (Thurs.), October 17 (Thurs.), November 21 (Thurs.) and December 11 (Wed.).

Participating via telephone is an option for those members unable to attend in person. Please notify the OUCC of such a need as early as possible.

**For Next Meeting (August 21, 2002):**

By July 26, 2002 the OUCC will distribute draft meeting minutes of the July 19<sup>th</sup> meeting.

By August 8, 2002 the following will be submitted to Anne Becker as agreed on July 19th:

- Summary reports on safety/reliability trends and causes of problems as well as worker productivity/benchmark trends (e.g. # of employees per MW produced or \$ of revenue):
  - Boyd Huff – EPRI
  - John Sampson – AEP and EEI
  - Fred Jones – IBEW and IOSHA
- Consider the contractor issue and, if warranted, ideas as to possible guests/associations to represent those interests at future committee meetings
- Identify specific sections of Wisconsin information relevant to minimum qualifications and training standards (Fred Jones)

By August 15, 2002 the OUCC will distribute to the committee a compilation of the members' responses submitted by August 8<sup>th</sup> in preparation for the next meeting.

The OUCC will invite/coordinate participation of the author and sponsor of HCR98 at the next meeting.

The meeting was adjourned at 12:30pm.

HCR 98 Electric Worker Training Standards Committee  
July 19, 2002 Meeting Minutes

**Marker Board Notes**

General Consensus:

- High School Diploma or GED
- Minimum competency in reading/math skills
- Minimum safety requirements such as OSHA 1910.269 (apply to utility employees and contractors)
- Existing apprenticeship programs in place do work, with respect to how workers learn of OSHA/employers' standards

Issues/Further Discussion:

- In-house employees vs. contractors
- Is adequate staffing an issue within the scope of the committee's charge (minimum qualifications and training standards)?
- Are apprenticeships offered at/by all utilities?
- Accountability vs. performance and meeting of standards? Management responsibility
- Is contractor viewpoint needed on the committee?

Possible Gaps:

- Contractor training, employee training standards
- Policing of OSHA compliance

Ideas:

- Data on safety incidents/violations
- Data on reliability incidents (CAIDI, SAIDI, SAIFI, GADS, ORAP) and causes (w/focus on those resulting from worker issues)
- Trend of worker productivity/benchmark levels over 10 years (MWH produced per # of employees, miles of electric line per # of employees, etc. etc.)
- Trend of number of permanent skilled employees and overtime per reliability measures (CAIDI, SAIDI, SAFI), plant availability, and safety records
- Analysis and results of safety/reliability data (in-house)



## HCR 98 Electric Worker Training Standards Committee

### August 21, 2002 Meeting Minutes

The meeting was called to order at 9:50am.

#### **Committee Members Present:**

Anne Becker, Dave Creech, Ken Foley, Matt Hemenway, Boyd Huff, Fred Jones, John Sampson, DeWayne Todd, Gary Woodall.

#### **Committee Members Absent:**

Dave Chlebek, Kevin McGann

#### **Approval of Minutes:**

The minutes of the July 19, 2002 meeting were approved.

#### **Review of Responses to July 19, 2002 Assignments:**

- John Sampson provided two graphs on AEP's system outages broken down by cause. As a result of discussion on these graphs, Anne Becker agreed to provide CAIDI, SAIDI and SAFI reports from IPL to the Committee prior to its next meeting. Gary Woodall agreed to make the connection between these reports and the committee's mission/task.
- Boyd Huff provided handouts on the Hoosier Energy Apprenticeship Training and Safety (HEATS) program and the Rural Electric Apprenticeship Program (REAP). Both programs are approved by the Department of Labor.
- Dave Creech provided a handout on the Indiana Municipal Electric Association's lineman apprenticeship program. Is a Department of Labor approved program a bottom line that the entire committee can agree to?
- Fred Jones offered information on plumber training and licensing in Indiana and suggested it as a model for the committee's work.
- Ken Foley provided a handout on contractor safety results from the Northwest Indiana Business Research Team (NWIBRT).
- EPRI and EEI are continuing to search for data responsive to the assignment(s).

#### **HCR 98 Sponsor Discussion of Legislative Intent:**

Sen. Craycraft and Rep. Adams discussed their intent with the resolution and answered members' questions via a telephone link. Rep. Adams indicated his intent not to change current programs, but to create minimum standards for all. Sen. Craycraft indicated his intent to put minimum standards for new employees in writing. Both indicated their intent that the standards apply to all electric utility workers, including temporary and contract workers. Sen. Craycraft indicated that it was the Committee's task to create minimum standards that would work for the whole state and that would not put hardship on smaller utilities. Representative Adams emphasized "joint" programs: labor and management working together to prevent reliability and safety problems. Both legislators indicated they don't want to burden anyone, but that they do want to prevent reliability and/or safety problems and hope that the ten Committee members could agree on a recommendation.

Both legislators indicated their interest in continuing the dialogue with the Committee if that would be helpful.

#### **Discussion and Obtain Consensus of Committee's Charge and Scope: Creation of Subgroups if warranted**

After discussion, the committee agreed to ask a labor and a management representative to draft two "strawman" proposals to serve as the starting point for the committee's work at the September meeting. One strawman would focus on the minimum qualifications necessary for any worker that constructs or maintains an electric utility or its equipment. The second strawman would focus on the minimum training standards for a lineman working on an Indiana electric utility line.

### **New Business:**

- Ken Foley announced that his employer recently changed from one NiSource subsidiary, Primary Energy, to another, NIPSCO. He noted his desire to continue serving on the committee with his experience in non-utility generation. After brief discussion, the committee voted without dissent to approve Ken Foley's continued participation. In her capacity as Chair, Anne Becker will provide this information to the author and sponsor of HCR 98 and the Indiana Utility Regulatory Commission.
- An August 6, 2002 letter from Jerry Payne (Indiana AFL-CIO) to Anne Becker on the subject of HCR 98 was provided to the Committee for its information.
- Anne Becker provided the members with a list of seven questions related to the committee's work and work process. The member's individual responses were compiled and distributed to the members prior to adjourning.
- As both John Sampson and Matt Hemenway will not be able to attend the Committee's September meeting, the committee reviewed the discussion and agreement reached at the July meeting on the question of absent members' voting rights. Participation in meetings, including voting, via telephone is encouraged when a member is unable to attend in person. Written and signed or e-mailed proxies will be accepted provided they indicate which committee member holds the proxy. Meetings are open to the public, including representatives of Committee members unable to attend in person. Concerns were shared that attendance by non-Committee members should not slow the progress the Committee is making.

### **Remaining Scheduled Meetings:**

September 19 (Thurs.), October 17 (Thurs.), November 21 (Thurs.) and December 11 (Wed.). All meetings will be held in the OUCC's large conference room. The Committee agreed to begin the **September meeting at 9:00 a.m. and end at 2:00 p.m.**

Participating via telephone is an option for those members unable to attend in person. Please notify the OUCC of such a need as early as possible.

### **Next Steps For September 19, 2002:**

By August 28, 2002 the OUCC will distribute draft meeting minutes of the August 21<sup>st</sup> meeting.

By September 6, 2002 the following will be submitted to the OUCC:

- Strawman on minimum qualifications necessary for any worker that constructs or maintains an electric utility or its equipment (Ken Foley and Kevin McGann tasked).
- Strawman on the minimum training standards for a lineman working on an Indiana electric utility line (Gary Woodall and Boyd Huff tasked).
- SAIDI, SAFI and CAIDI data for IPL (Anne Becker) and connection of data to Committee's task to recommend minimum qualifications and training standards (Gary Woodall)
- Summary reports on safety/reliability trends and causes of problems as well as worker productivity/benchmark trends (e.g. # of employees per MW produced or \$ of revenue)(John Sampson/Boyd Huff – EPRI/EEI)
- Thoughts, ideas, recommendations on the process by which the Committee will seek to accomplish its task (Review the compilation of answers to the seven questions asked at the August 21<sup>st</sup> meeting).
- Identify specific sections of Wisconsin information relevant to minimum qualifications and training standards (Fred Jones)

By September 12, 2002 the OUCC will distribute to the committee a compilation of the members' responses (submitted by September 6<sup>th</sup>) in preparation for the Committee's September meeting. The OUCC will also distribute draft ground rules for process designed to assist the Committee in reaching consensus more quickly.

The OUCC will contact John Delgado of the U.S. Department of Labor and invite him to address the committee and its questions on the subject of BAT-approved training programs at the September meeting.

The OUCC will arrange for lunch at the September meeting so that the committee may work through lunch until 2 p.m.

The meeting was adjourned at 1:15pm.

# HCR 98 Electric Worker Training Standards Committee

## September 19, 2002 Meeting Minutes

The meeting was called to order at 9:05am.

### **Committee Members Present:**

Anne Becker, Dave Creech, Ken Foley, Dave Chlebek, Boyd Huff, Fred Jones, DeWayne Todd, Gary Woodall.

### **Committee Members Absent:**

Kevin McGann, John Sampson, Matt Hemenway

### **Guests:**

Fred Combs (Cinergy) in John Sampson's absence, Greg Collins (US Department of Labor), Gayvin Strantz (IN Statewide Assoc. of Rural Electric Cooperatives/REAP), Bob Richhart (Hoosier Energy/HEATS program)

### **Approval of Minutes:**

The minutes of the August 21, 2002 meeting (second draft) were approved.

### **Review of Committee Ground Rules:**

Anne Becker presented a list of ground rules gleaned from the feedback provided at the Committee's August meeting. The purpose of the rules is to assist the Committee in reaching a successful conclusion intended by the authors of HCR 98. No committee feedback or discussion; adoption by acquiescence.

### **Old Business:**

Bob Richhart and Gayvin Strantz were introduced to present brief overviews of, and answer questions about, their respective lineman apprenticeship programs. Both REAP and HEATS are "joint" programs and approved by the Bureau of Apprenticeship Training (BAT), U.S. Department of Labor. Both programs provide option to apply training program hours to post-secondary degrees.

### **Review of Strawman Proposals:**

Committee first discussed the strawman on minimum qualifications necessary for regular, full-time employees at Indiana electric utility companies to enter into certain transmission/distribution and generating station positions. A few changes to the wording were discussed and will be incorporated into the next draft of the document.

<b>Minimum Qualification Strawman Discussion Q &amp; A</b>		
<b>Probable Agreement</b>	<b>Possible Agreement</b>	<b>Questions</b>
High school diploma, GED	Valid drivers license	Commercial Drivers License
Aptitude screening tests <ul style="list-style-type: none"><li>• Standardized</li><li>• Industry or general</li><li>• Appropriate criteria</li></ul>	Physical abilities <ul style="list-style-type: none"><li>• based on job requirements</li><li>• Examples are color blindness, strength</li></ul>	

Committee then moved discussion to strawman on minimum qualifications and training standards for linemen. Greg Collins provided an overview of U.S. Dept. of Labor BAT approved apprenticeship programs. Both union or non-union programs can be approved. Focus is on basic skills and common core training among all workers (Handout: Dept. of Labor work process schedules for linemen. Schedules available for 900+ occupations). Instruction through on the job and classroom training. Periodic evaluation of apprentices required with failure if standards can't be met. In most companies, the program is run by a

board or committee, but one is not required by the DoL; a “joint” committee of management and labor is felt by Collins to work best. (A designated “Supervisor of Apprentices” is required by the DoL in the administration of an apprenticeship program.) Equal opportunity/affirmative action guidelines required if five or more employees are in program. Specific ratios of skilled to apprenticed workers required on job. Wage scale that differentiates between skilled and apprenticed workers is required. Committee asked a variety of detailed questions about how the BAT approval process works with many focused on the flexibility or inflexibility of the approval process. Collins indicated that it is a flexible process. Richhart and Strantz echoed opinion on effectiveness of “joint” programs and flexibility of process. On the latter, both noted that smallest utilities involved in their programs had 8 and 3 employees respectively and that DoL approves new, unique job classifications that reflect the multi-trade work most small utility employees perform.

<b>Lineman Strawman Discussion Q &amp; A</b>	
<b>Question</b>	<b>Answer</b>
Should state license be required to work on electric utility property?	Outside scope of Committee’s charge. Raise in final report as issue deserving further study?
How to enforce if IURC adopted DoL guidelines for Indiana electric utilities?	Enforcement is a separate issue outside scope of Committee’s charge.
Would minimum training rules, if adopted by IURC, apply to utilities withdrawn from IURC jurisdiction or entities such as Independent Power Producers (IPPs) that are not “traditional” electric utilities?	Further research needed to answer.
DoL’s guidelines a hardship for contractors and within scope of Committee’s charge?	To be determined.
Is actual approval by DoL needed, would use of DoL guidelines suffice?	To be determined.

Committee agreed to consider discussion and questions with goal of completing discussion on, any necessary revisions to, and formal vote on the strawman proposals at the October meeting.

Committee discussed its charge in relation to all possible job classifications and all present agreed to work to provide the IURC with recommendations on minimum qualifications and training standards for the following, five most important job classifications: (1) lineman, (2) generation unit operator, (3) SCADA/Relay specialist, (4) Substation mechanic, (5) electronic metering specialist. Relevant safety guidelines are provided by OSHA 1910.269.

**New Business:** None.

**Next Steps for the October 17, 2002 Meeting:**

By October 3, 2002 OUCC will distribute draft meeting minutes of the September 19<sup>th</sup> meeting.

By October 8, 2002 OUCC will distribute the following:

- Revised strawman on minimum qualifications necessary for regular, full-time employees at Indiana electric utility companies to enter into certain transmission/distribution and generating station positions (Ken Foley and Kevin McGann facilitating).
- Revised strawman on the minimum training standards for a lineman working on an Indiana electric utility line (Gary Woodall and Boyd Huff facilitating).

- DoL Work Process Schedules for the five job classifications as selected by the Committee (Dave Creech and Gary Woodall facilitating).

At the October 17<sup>th</sup> meeting, members will (1) discuss, modify as needed, and vote on the minimum qualifications and lineman strawman proposals, and (2) review and discuss the DoL Work Process Schedules for the remaining four classifications (generation unit operator, SCADA/Relay specialist, Substation mechanic and Electronic metering specialist).

**Next Steps for the November 19<sup>th</sup> meeting:**

Members will (1) discuss, modify as needed, and vote on the remaining four classifications, and (2) review and discuss a first draft of the Committee's report to the IURC.

**Next Steps for the December 11<sup>th</sup> meeting:**

Members will (1) vote on any remaining outstanding issues, and (2) discuss, modify as needed, and vote on the Committee's report to the IURC.

**Remaining Scheduled Meetings:**

October 17 (Thurs.), November 19 (Tues. - *NOTE: new day/date*) and December 11 (Wed.). All meetings will be held in the OUCC's large conference room. The Committee agreed to begin the **October meeting** at **9:00 a.m.** and end at **Noon** (Indianapolis time).

The meeting was adjourned at 2:00pm.

## HCR 98 Electric Worker Training Standards Committee

### October 17, 2002 Meeting Minutes

The meeting was called to order at 9:30am.

**Committee Members Present:** Anne Becker, Dave Creech, Ken Foley, Matt Hemenway, Boyd Huff, Fred Jones, Kevin McGann, John Sampson, DeWayne Todd, Gary Woodall.

**Committee Members Absent:** Dave Chlebek (partial attendance via telephone, proxy assigned to Gary Woodall)

#### **Approval of Minutes:**

The minutes of the September 19, 2002 meeting (second draft) were approved.

#### **Old Business:**

Discussion about some confusion as to the start time for the October meeting (changed to 9am from the more traditional 9:30am at the August meeting) and recognition of the coming time change for certain areas of the state led to the clarification of start times for the November and December meetings. Both will be begin at 9:30am, Indianapolis time.

Reminder: As agreed, the November meeting will be held on the 19<sup>th</sup> (NOT the 21<sup>st</sup> as originally scheduled) and will run from 9:30am until 5pm with the OUCC providing lunch.

Ken Foley provided an updated mailing address and fax number. A revised contact sheet will be distributed to the Committee with this information.

#### **Review of Minimum Qualifications Proposal:**

After a great deal of discussion, the Committee adopted by an 8-2 vote (Sampson and Creech voting no, Woodall voting yes with Chlebek's proxy) the attached Proposal 1 recommending the establishment of certain minimum entry-level qualification standards for entry into certain transmission/distribution and generating station positions. The primary focus of the discussion related to whether such qualifications should apply only to utility employees or whether it should also apply to contractors working for a utility. Proposal 1, as adopted, indicates that the proposed standards should apply to Indiana electric utilities. Discussion on the worker applicability issue will be summarized in the Committee's report to the IURC.

#### **Review of Lineman Training Proposal:**

After discussion, the Committee decided not to vote on the proposal for minimum skill and training standards for linemen. Primary issue was whether U.S. Dept. of Labor, Bureau of Apprenticeship Training (BAT) certification should be required for lineman training programs or if BAT requirements should serve as a minimum benchmark or guideline for such programs. It was decided to continue this discussion at the November meeting and that one or more proposals addressing this issue would be shared with the Committee members for their consideration prior to that meeting.

**New Business:** None.

#### **Next Steps for the November 19, 2002 Meeting:**

OUC will distribute:

- Draft meeting minutes of the October 17<sup>th</sup> meeting
- Electronic version of Proposal 1 with a suggested title
- Revised proposal(s) on the minimum skill and training standards for a lineman working on an Indiana electric utility line
- Outline of the Committee's report to the IURC

At the November 19<sup>th</sup> meeting, members will (1) discuss, modify as needed, and vote on the lineman

proposal(s), (2) discuss, modify as needed, and vote on the proposals for the remaining four job classifications (generation unit operator, SCADA/Relay specialist, Substation mechanic and Electronic metering specialist). and (3) review and discuss the Committee's report to the IURC.

**Next Steps for the December 11<sup>th</sup> meeting:**

Members will (1) vote on any remaining outstanding issues, and (2) discuss, modify as needed, and vote on the Committee's report to the IURC.

**Remaining Scheduled Meetings:**

- November 19 (Tues.- *Note change from originally scheduled 11/21 date*)
- December 11 (Wed.).

The Committee agreed to begin the November and December meetings at 9:30am (**Indianapolis time**).

The November 19<sup>th</sup> meeting will run from 9:30am until 5pm (Indianapolis time) with the OUCC providing lunch.

All meetings will be held in the OUCC's large conference room.

The meeting was adjourned at 1:20pm.



**IURC TRAINING STANDARDS COMMITTEE**  
**PROPOSAL NO. 1**

[H.I. New Title]

**PROPOSAL No. 1:**

This proposal, written for discussion purposes, consists of a series of bullet points for ease in review by the Training Standards Committee. It is proposed that Indiana electric utility company management would use these criteria to establish minimum entry-level qualification standards for entry into certain transmission/distribution and generating station positions, as referenced below. The intent here is to help ensure that appropriate levels of quality, performance and safety are achieved for the electric system and among utilities. These criteria are proposed as a minimum, and are not intended to prevent company management from establishing or modifying standards beyond the minimum criteria in order to accommodate, for example, advances in technology, or to meet specific needs.

- Criteria would apply to Indiana electric utilities.
- Meeting the criteria would be necessary for entry into the positions described below.
- Positions (as typically referenced in the electric utility industry) for which these standards apply are limited to those with apprenticeship training programs, structured on-the-job training, or operating lines of progression for becoming a lineman, substation mechanic, SCADA/relaying specialist, electronic metering specialist, or generating station unit operator.
- The minimum standardized skills required for entry into these positions include:
  - Possession of a high school diploma or GED equivalency certificate.
  - Performance at an acceptable level on a battery of screening tests, using either test content developed specifically for the position by individual companies, or using appropriate tests available from electric utility industry groups such as the Electric Power Research Institute or the Edison Electric Institute. Additional test battery criteria include:
    - Proper validation for the particular position for which the test battery would be used.
    - Test battery content may be different for different positions.
    - Acceptable level of performance to be established for each position.
    - Meet legal requirements for testing practice.
    - Written and/or multiple-choice questions, administered in a confidential, timed, classroom environment consistent with the specific test's validation criteria.

- A set of topics for each test battery that is appropriate for the position, designed to measure the candidate's ability to absorb training and become successful in the position, for example, but not limited to: reading comprehension, graphic arithmetic, mechanical concepts, mathematical usage, spatial ability, and reading tables and graphs.
- Capable of being administered by the utility company on its premises, or by a local school testing facility such as Ivy Tech, or by other appropriate institutions.
- Capable of being audited, and having general information on test performance provided on an individual basis.

10-17-02

## HCR 98 Electric Worker Training Standards Committee

### November 19, 2002 Meeting Minutes

The meeting was called to order at 9:40am.

**Committee Members Present:** Anne Becker, Dave Chlebek, Dave Creech, Ken Foley, Matt Hemenway, Boyd Huff, Fred Jones, Kevin McGann, John Sampson, DeWayne Todd, Gary Woodall.

#### **Approval of Minutes:**

The minutes of the October 17, 2002 meeting were approved without revision.

#### **Old Business:**

The Committee discussed and approved using the title "Minimum Qualifications for Entry Into Certain Electric Utility Positions" for Proposal 1 adopted at the October meeting. The Committee also briefly discussed revising the form - not substance - of the document in preparation for its submittal to the IURC as a recommendation but decided not to make any further changes.

#### **Review of Minimum Training Standards Proposal:**

Two new proposals were shared with the committee - a modified version of the October proposal offered by Anne Becker and a new proposal offered by Fred Jones. The Committee's labor and management groups then met separately to discuss the proposals. After meeting with both groups, the Chair prepared an additional proposal for consideration. This proposal was modified several times by both groups until it became clear that the parties were at an impasse centered on two issues discussed in previous meetings: the use of U.S. Dept. of Labor, Bureau of Apprenticeship Training (BAT) as a guideline or a requirement and the applicability of minimum utility training standards to contractors working on utility systems.

The Committee acknowledged the impasse and agreed to the following process: The Committee's report would reflect areas of agreement (the need for minimum training standards and the importance of, and utility accountability for, reliability and safety), areas of disagreement (identified above) and include two summary statements on the issue prepared by the Committee's labor and management groups. These statements will be no more than three pages in length using a 12 point Arial font, single space copy, double space between paragraphs and one inch margins.

#### **IURC Report Outline:**

An outline of the report was reviewed. Brief discussion on revisions needed in light of the plan of action adopted on the subject of minimum training standards.

**New Business:** None.

#### **Next Steps:**

The Committee has one final scheduled meeting on Wednesday, December 11, 2002 from 9:30am until Noon (**Indianapolis time**) in the OUCC's large conference room. At this meeting members will review and approve the Committee's report to the IURC.

By December 4<sup>th</sup>, the OUCC will distribute:

- Draft meeting minutes of the November 19<sup>th</sup> meeting
- Draft of the Committee's report to the IURC

By December 10<sup>th</sup>, Committee's labor and management representatives will submit their respective group statements for inclusion in the Committee's report.

#### **Adjournment:**

The meeting was adjourned at 3:30pm.

## HCR 98 Electric Worker Training Standards Committee

### December 11, 2002 Meeting Minutes

The meeting was called to order at 10:05am.

**Committee Members Present:** Anne Becker, Dave Creech, Matt Hemenway, Boyd Huff, Kevin McGann, John Sampson, DeWayne Todd.

**Committee Members Absent:** Dave Chlebek, Ken Foley (proxy to John Sampson), Fred Jones and Gary Woodall (proxies to Matt Hemenway).

**Guest:**

Gretchen Gutman (Sommer Barnard Ackerson)

**Approval of Minutes:**

The minutes of the November 19, 2002 meeting were approved without revision.

**Old Business:**

The Committee's labor and management representatives have submitted their respective groups' summary statement as agreed at the November meeting. These statements will be included in the Committee's report to the IURC without modification except as needed to conform with the formatting requirements agreed to at the November meeting.

**HCR 98 Report to IURC:**

Minor edits to the draft report suggested by Ken Foley were discussed and incorporated as agreed upon.

**New Business:** None.

**Concluding Steps:**

By December 13, Chair Becker will submit to the IURC the Committee's report as approved today. Concurrently, the Chair will provide copies of this submittal to the Committee members and HCR 98's author and sponsor.

Chair Becker expressed her appreciation to the committee members for their participation in this process. While there are strong differences of opinion on certain points, each member's commitment to a professional discussion of the vital issues of electric reliability and safety in our state helped to move this process forward.

The minutes of the December 11, 2002 meeting were approved and will be included with the Committee's report to the Indiana Utility Regulatory Commission.

**Adjournment:**

The final meeting of the HCR 98 Committee was adjourned at 10:30 pm.

## **Appendix D**

### **U.S. Department of Labor, HEATS, REAP Handouts**