

I-SEM Project

Training Plan for Participants

May 2017

Version Control

Version	Date	Author	Comments/Changes
1.0	31.05.2017	Marek Hyla	

Document Purpose

Why

- The Training Plan provides a detailed picture of what, when, and how the training for participating organisations will be delivered.

What

- This Training Plan provides information regarding;
 - guidelines for training delivery,
 - training curriculum (Training Days, Training Blocks, Training Topics, Learning Objectives),
 - high-level schedules of training activities (self-learning and instructor-led training),
 - communications plan,
 - training locations and venues,
 - other important considerations.

When

- This document focuses on the TSOs provision of participant training prior to the start of Market Trial.

How

- This document should be used together with the Training Approach for Participants (published on the I-SEM website on the 28th of February). After reading it people responsible for the training are expected to:
 - determine who requires what training,
 - sign Trainees up for training,
 - ensure that sufficient time is made available to Trainees to undertake the necessary on-line training which is a precursor to the classroom training,
 - delegate Trainees for relevant instructor-lead training,
 - support Trainees in their learning effort and demand specific actions related with building I-SEM skills.

Who

- This Training Plan was prepared for people responsible for I-SEM training activities on the Participant side.

Guidelines for I-SEM Training

The role of the I-SEM Training Team

- The I-SEM Training Team will provide and manage the training programme. Participants should use the training programme to build their I-SEM readiness at their own discretion.
- The I-SEM Training Team should not be considered as an entity responsible for:
 - providing training infrastructure (such as computers, systems, applications, etc.) apart from the Learning Management System,
 - providing technical support related with training,
 - meeting training expectations and plans of a particular organisation,
 - providing more Instructor-Led Training sessions than is planned based on the Training Needs Analysis,
 - providing any business-related guidance based on the I-SEM rules.

Trainees' Responsibility for the Training

- Trainees will be responsible for:
 - Securing access to learning environment (Learning Management Systems) and self-learning materials,
 - Preparation for Instructor-led Training by completing Self-Learning Training (reading through materials provided via the Learning Management System),
 - Self-registration for Instructor-led Training sessions,
 - Active participation in the Instructor-led Training session,
 - All logistics necessary to participate in Instructor-led Training sessions (transportation, accommodation, per diems, etc.).

Participation is not Mandatory, but is Recommended

- Participation in the I-SEM Training programme on the whole or in any of its parts is not obligatory.
 - The I-SEM Training Team recommends that Participants to take part, at least, in the self-learning part of the programme dedicated to an individual Trainee. This will help decisions regarding participation in specific training activities.
 - The Priority Map (showing the most important parts of the training for a particular organisation) is presented in the next part of the document.
- Passing Pre-Market Trial Test is not obligatory.
 - It is recommended to take the test to allow Trainees build confidence or to understand gaps which should be closed before or during Market Trial.
- Passing quizzes on the Learning Management System is not obligatory.
 - The purpose of a quiz is to reinforce key messages from the Training Topic. It should allow Trainees to build confidence or to understand gaps which should be closed before or during Market Trial.

Engagement and Motivation

- The training process will be scored
 - On completion of every part of the training (Self-learning material or Instructor-led training session) the Trainee will be provided with a specific number of CPD (Continuing Professional Development) points and a badge (visual representation of course completion).
 - After completion of a self-learning course the number of CPD points aligned with self-learning time will be provided (in most cases 1 CPD point),
 - Participation in one day-long training will provide 5 CPD points.
- At the end of the I-SEM Training Programme Trainees will be awarded with a Certificate of Completion
 - The level of the certificate (Bronze, Silver or Gold) will be dependent on the number of collected points by the Trainee:
 - Bronze level - after collecting 10 points,
 - Silver level - after collecting 30 points,
 - Gold level - after collecting 50 points.

Support for Engagement and Motivation of Trainees

- Reminders of learning activities and other training project-related communications will be sent from the I-SEM Learning Management System to Trainees.
- Engagement reports (covering engagement of Trainees from specific organisations) will be provided to Training Contacts on demand. Reports will provide information about:
 - Self-learning engagement,
 - Results of quizzes concluding Training Topics,
 - Participation in Instructor-led Training sessions,
 - Results of Pre-Market Trial test.
- Training Contacts can use these Reports to reinforce engagement and motivation of their Trainees.

Learning Approaches

From known to unknown

- Some of the I-SEM rules are based on current rules-created and implemented for SEM. These new rules will be explained in relation to changes to current known and implemented rules. This approach will help the trainee to anchor new knowledge and understand new regulations.
- New rules (such as SEMOpx, AoLR, CMC), as well as rules substantially modified (e.g. T&SC) will be explained from first principles. For these Training Topics, there will be a bigger effort to deliver end-to-end multi-tier training based on a blended learning approach (see next slides).

Colour Coding of Training Materials and Sessions

- Different Participants have different training needs. The Training Team will endeavour to provide clear information about what self-learning and what instructor led training sessions are, relevant to specific participant groups.
 - This relevance will be shown using colours codes showing:
 - Green – Training Topics which are highly relevant (important) for a specific type of participating organisation (it should be taken),
 - Yellow – Training Topics which are moderately relevant (useful) for a specific type of participating organisation (it might be taken),
 - Red - Training Topics which are not relevant (optional) for a specific type of participating organisation (it could be skipped).
 - Colour coding is matched to a type of participating organisation – not to a role within this organisation.

** Colour codes are provided on a basis of **the** subjective judgment of EirGrid/SONI Subject-Matter Experts*

*** See also [Priority Map](#) on slide 32.*

Multi-tier Training

- Tier 1: Overview of the Training Topic
 - Provided as self-learning
 - Goal: to build high-level knowledge of rules related to the Training Topic
 - Training approaches: documents, PowerPoint decks, quizzes
- Tier 2: Theory on all Training Topics
 - Provided during Instructor-led Training as a follow up to Self-Learning
 - Goal: to build more detailed knowledge about the rules related with the Training Topic
 - Training approaches: presentations, discussions, “responding to” questions
- Tier 3: Details and Examples
 - Provided during Instructor-led Training
 - Goal: to build operational skills related with the Training Topic
 - Training approaches: explanations, exercises, “pen-and-paper” simulations

Blended learning

1. Self-learning

– Goals:

- to get the basics,
- to let all Trainees build understanding of the I-SEM (even for those who will not be able to take part in any of Instructor-led Training sessions).

2. Instructor-led Training

– Goals:

- to reinforce and develop learning from self-learning stage,
- to explore Training Topics in more detail,
- to have better insights based on discussions and exercises.

3. Market Trial

– Goals:

- to provide an opportunity to apply what has been learned in an environment without financial consequence,
- to rehearse what I have learned.

Feedback

- Self-learning activities will be supported by quizzes i.e. interactive checks of comprehension at the end of the Training Topic.
- Results of exercises taken during Detail and Examples parts of Instructor-led Training sessions will be discussed to allow Trainees to better understand the rationale.
- Quizzes are a non-mandatory part of training. However, badge and CPD points for completion of self-learning course will only be provided to Trainees who pass these checkpoints.
- The Pre-Market Trial Test will deliver additional feedback regarding the comprehension of I-SEM rules.

Learning Environment

Individual Learning Space for Self-Learning

- All I-SEM training materials will be hosted on a separate space provided by the Learning Management System. Training materials will not be mixed with any other project-related content or SEM content.
- The Learning Management System will be available for self-learning and self-management activities on a 24/7 basis (excluding maintenance time).
- The I-SEM Training Team is not responsible for solving any potential, technical issues regarding access to the Learning Management System (they are to be solved on the Participant side).
 - If needed, the I-SEM Training Team will provide information regarding technical requirements.
- The Learning Management System will be stand-alone – no integration with other HR or learning systems on the Participants' side will be provided.

Access to the Learning Management System

- Every Trainee will have an individual learning space (an account with personal login and password) on the Learning Management System.
 - Logins and passwords should not be passed to other Trainees.
- Accounts will be created by Trainees (self-registration). Invitations to create an account will be sent to all Trainees from the list provided by Training Contacts from participating organisations.
 - Requests to add or remove Trainees (or for any reason, to close an account of a specific Trainee) can be provided at any stage via the Query Management Process.
- Only the I-SEM Training Team will have access to the Learning Management System at the administration level.
 - Administration access will be not provided to Training Contacts.

Learning Management System Operation

- The Learning Management System for I-SEM Training is simple and intuitive. Only necessary functionality will be turned on to reduce any clutter and to allow trainees to understand and use the system.
- Simple guides (related to the Self-learning space and Instructor-led Training space) in the PDF format will be provided to help Trainees understand important functions.

Instructor-led Training Sessions

Self-registration to Instructor Led Training session

- The Learning Management System will provide information about all Instructor-led Training sessions.
- Trainees will be asked to self-manage their participation in Instructor-led Training sessions by:
 - choosing a session in alignment with their needs and working routines,
 - registering for a specific Instructor-led Training session,
 - cancelling (if necessary) their participation in Instructor-led Training sessions as early as possible,
 - preparing for the session (by completing self-learning materials) prior to going to the event.

Rules for Self-registration

- Registration for a specific Instructor-led Training session will be available at least 4 weeks prior to the session until all seats are booked.
 - The number of available seats will be provided
- The I-SEM Training Team reserves the right to reject a registration or cancel the whole session in specific circumstances such as:
 - Too many Trainees registered from one organisation,
 - No-show* of a Trainee on previous instructor-led training session without cancelling registration at least 7 days in advance,
 - Too small number of registered Trainees (rescheduling of the training session).
- Registration is provided on a first come, first served basis.

** No-show of a Trainee will be reported to the Training Contact from the participating organisation.*

Instructor-led Training Sessions

- Instructor-led Training sessions will be delivered in Dublin and Belfast only.
- At least two Instructor-led Training sessions of the same topic will be delivered per each location (Dublin and Belfast).
- All Instructor-led Training sessions will be provided as open events which means that all Trainees will be able to self-register to any Instructor-led Training session*.
- On-site participation in Instructor-led Training sessions is necessary – remote access to the training (via Lync/Skype, etc.) will not be provided.
- Some training sessions will be recorded. Recorded material will be placed on the Learning Management System as training materials.
 - By participating in the classroom training, Trainees consent to the sessions being recorded and the recordings being made available on the Learning Management System as training materials.

** Closed Instructor-led Training sessions (training sessions dedicated for specific organisations delivered in their premises) will be not delivered as part of the I-SEM Training programme.*

Preparation for Instructor-led Training Sessions

- The main goal of the Instructor-led Training sessions is to;
 - reinforce self-learning and to provide better insights into training topics,
 - allow the opportunity to explore certain topics in more detail,
 - respond to questions and issues,
 - discuss concerns which are raised after the self-learning process.
- For efficiency of participation in such a session **it is recommended that Trainees complete the self-learning module related to the Instructor-led Training session before coming to the session.**

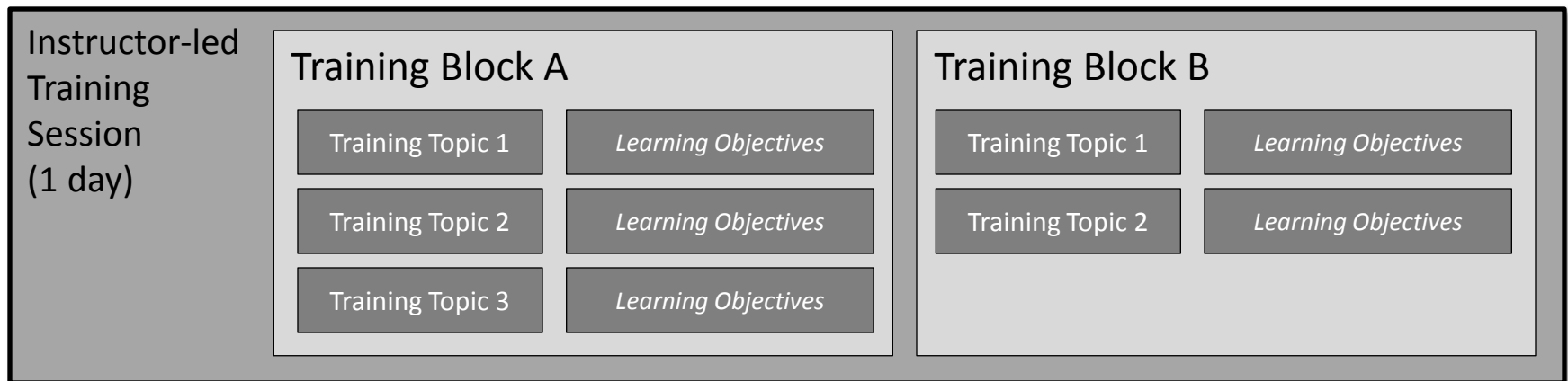
Training Venues

- Training will be delivered in selected training facilities in selected, city centre hotels in Dublin and Belfast
- The maximum number of Trainees in Dublin is set to 120 and the maximum number of Trainees in Belfast is set to 80 people.
- Information about the location of the training will be provided at least 4 weeks before the event.

Curriculum

Structure of Training Curriculum

- Training activities are divided into Training Blocks dedicated to specific areas of the I-SEM.
- Every Training Block consists of a small number of Training Topics, which are defined by specific Learning Objectives.
- An Instructor-led Training session typically consists of a number of small Training Blocks, as per the example below:



Training Blocks for Participants' I-SEM Training - 1/3

Training Block	Training Topic	Training Code	Learning Objectives <i>After the training, the trainee will have an understanding or appreciation of ...</i>
Markets Overview	Market Design	MO	the different markets and their structure in the I-SEM the evolution of the power market in Ireland a high level day in the life for a participant in the I-SEM the governance process for the I-SEM the change control process for each market the different rule-sets that apply over each market
Registration	Capacity Market	REG_CM	the parameter setting process technical requirement for de-rating TSO / DSO requirements for registration data requirements of registration the qualification requirements for auctions suspension, de-registration and termination process
	Balancing Market	REG_BM	technical requirements of registration the interaction requirements with relevant system operators data submission and default data requirements suspension, de-registration and termination process the process for user access management
	SEMOpx	REG_PX	onboarding trading the onboarding process for clearing requirements the data requirements for registration suspension, de-registration and termination process
Market Participant Interface	Capacity Market Bidding	MPI_CM	technical and data submissions to the market operators the process of data submissions the timing requirements for data submission to auctions the timeline for auctions the data reporting requirements and how to access auction results
	Balancing Market Bidding & Data Submission	MPI_BM	how to access SEMO balancing market systems timelines for data submission for the balancing market process for technical data requirements for the BM process for commercial data requirements for the BM the application of complex and simple commercial offer data in the BM default data requirements and how these are used in the BM the Validation Technical Offer Data process how to access data publications
	SEMOpx Bidding	MPI_PX	how to access SEMOpx systems timelines for data submission for day-ahead auctions, intraday auctions process for data submission for intraday continuous market the products available in each of the market segments how to access data publications

Training Blocks for Participants' I-SEM Training - 2/3

Training Block	Training Topic	Training Code	Learning Objectives <i>After the training, the trainee will have an understanding or appreciation of ...</i>
Pricing / Scheduling	Capacity Market Auctions	PS_CM	the creation of the demand curve tie break rules market clearing process
	TSO Scheduling	PSS_BM	the TSO forecasting process for wind and demand the TSO long-term scheduling process the real-time management process the application of system constraints
	Imbalance Pricing	PSP_BM	the application of TSO decisions in Imbalance Price Formation the determination of energy vs. no energy actions the application of imbalance price parameters
	Auctions Clearing	PSA_PX	the auction clearing process the market coupling process the validation rules fallback procedures the regional coupling processes
	IntraDay Market (Continuous)	PSC_PX	the validation rules fallback procedures the operation of continuous matching process
Settlements	Capacity Market Settlements	SE_CM	the timing and processes for Capacity Market Settlements the payment calculation for Capacity Market units the different payments and charges processes the supplier charging processes
	IMB Settlements	SE_BM	the timing and processes for IMB Settlement how quantities are calculated unit specific settlement items the supplier charging regime
	SEMOpX	SE_PX	the timing and processes for SEMOpX the requirement for clearing house settlement
Credit Risk	SEMO (CM & IMB)	CR_SEMO	the obligations for credit risk with SEMO the timings and processes the methodology for calculating collateral requirements the impact of collateral requirements with respect to trading across the I-SEM
	SEMOpX (ECC)	CR_PX	the obligations for credit risk with SEMOpX the timings and processes the methodology for calculating collateral requirements

Training Blocks for Participants' I-SEM Training - 3/3

Training Block	Training Topic	Training Code	Learning Objectives <i>After the training, the trainee will have an understanding or appreciation of ...</i>
Invoicing / Fund Transfer	SEMO (CM & IMB)	FT_SEMO	the timings and processes involved the settlement reallocation capability the implications of single SEMO settlement e.g. M+4/M+13 Inclusion VAT treatment and the settlement document content
	SEMOpx (DAM & IDM) (ECC)	FT_PX	the timings and processes involved in invoicing and funds transfer the timings and processes involved in limit management VAT treatment and the invoice content
Query Management	SEMO (CM & IMB)	QM_SEMO	the requirements for query submission the obligations for timing and resolution the market data items that can be subject to query what data items to review when considering data reports
	SEMOpx (DAM & IDM)	QM_PX	the requirements for query submission the obligations for timing and resolution the market data items that can be subject to query what data items to review when considering data reports
Disputes	SEMO (CM & IMB)	DP_SEMO	timing and processes involved rights and obligations for the participant SEMO obligations when and how to escalate a query into a dispute
	SEMOpx (DAM & IDM)	DP_PX	timing and processes involved rights and obligations for the participant SEMO obligations when and how to escalate a query into a dispute

Relevance of the Training

- The following types of Participants were taken into account while preparing the Training Plan:
 - Dispatchable Generators,
 - Demand Side Units,
 - Assetless Units,
 - Large Suppliers,
 - Small Suppliers,
 - Controllable Generators,
 - Small Renewable Generators,
 - Others (MDPs, ICOs, etc.)
- Although the training is open to all and it is the responsibility of each organisation to determine which sessions its staff should enrol in, the relevance of the self-learning materials and classroom training may vary depending upon the target group, as shown in the Priority Map detailed on the next slide.

Priority Map showing training relevance

The map below shows the EirGrid/SONI understanding of potential interest to enrol in self-learning and instructor led training sessions covering specific Training Topics.

		Priority Map for Participants Training								
Training Block	Training Topic	Training Code	Dispatchable Generators	Demand Side Units	Assetless Units	Large Suppliers	Small Suppliers	Controllable Generators	Small Renewable Generators	Others (MDPs, ICOs, etc.)
Markets Overview		MO	●	●	●	●	●	●	●	Dependent on type of organization (to be determined on a basis of Learning Objectives)
Registration	CM	REG_CM	●	●	●	●	●	●	●	
	BM	REG_BM	●	●	●	●	●	●	●	
	SEMOpx	REG_PX	●	●	●	●	●	●	●	
Market Participant Interface	CM bidding	MPI_CM	●	●	●	●	●	●	●	
	BM bidding & data submission	MPI_BM	●	●	●	●	●	●	●	
	SEMOpx bidding	MPI_PX	●	●	●	●	●	●	●	
Pricing / Scheduling	CM Auctions	PS_CM	●	●	●	●	●	●	●	
	TSO Scheduling	PSS_BM	●	●	●	●	●	●	●	
	Imbalance Pricing	PSP_BM	●	●	●	●	●	●	●	
	Auctions Clearing	PSA_PX	●	●	●	●	●	●	●	
	IDM (continuous)	PSC_PX	●	●	●	●	●	●	●	
	Capacity Market Settlements	SE_CM	●	●	●	●	●	●	●	
Settlements	IMB Settlements	SE_BM	●	●	●	●	●	●	●	
	SEMO px	SE_PX	●	●	●	●	●	●	●	
Credit Risk	SEMO (CM & IMB)	CR_SEMO	●	●	●	●	●	●	●	
	SEMOpx (ECC)	CR_PX	●	●	●	●	●	●	●	
Invoicing / Fund Transfer	SEMO (CM & IMB)	FT_SEMO	●	●	●	●	●	●	●	
	SEMOpx (DAM & IDM)	FT_PX	●	●	●	●	●	●	●	
Query Management	SEMO (CM & IMB)	QM_SEMO	●	●	●	●	●	●	●	
	SEMOpx (DAM & IDM)	QM_PX	●	●	●	●	●	●	●	
Disputes	SEMO (CM & IMB)	DP_SEMO	●	●	●	●	●	●	●	
	SEMOpx (DAM & IDM)	DP_PX	●	●	●	●	●	●	●	

Key for the Heat Map above

●	High interest for this Training Topic expected
●	Middle interest for this Training Topic expected
●	Low interest for this Training Topic expected

** Every self-learning material and every Instructor-led Training session provided by the Learning Management System will be flagged with these three colours to help the Trainee in making a decision on whether to enrol in the training or not.*

Scope of the Training

EirGrid/SONI will provide the following training activities. These options should be individually considered in relation to the Priority Map presented on the previous slide.

Grouped Topics	Topics	Training Code	1. Self-Learning [estimated hours]	ILT [in days]
Market Overview	Market Overview	MO	3	Day 1
Capacity Market (Registration, MPI & Pricing / Scheduling)	CM Registration and Qualification	REG_CM	1	Day 2
	CM Bidding	MPI_CM	1	
	CM Auctions	PS_CM	1	
Balancing Market (Registration, MPI, Pricing/Scheduling)	BM Registration	REG_BM	1	Day 3
	BM Bidding & Data Submission	MPI_BM	1	Day 4
	TSO Scheduling	PSS_BM	1	
	Imbalance Pricing	PSP_BM	1	
SEMOpx (Registration, MPI, Pricing / Scheduling, Settlements, Credit Risk, Invoicing / Fund Transfer, Query, Disputes)	SEMOpx Registration	REG_PX	1	Day 5
	SEMOpx Bidding	MPI_PX	1	
	SEMOpx (DAM & IDM)	FT_PX	1	
	Auctions Clearing	PSA_PX	1	Day 6
	IDM (Continuous)	PSC_PX	1	
	SEMO px	SE_PX	1	Day 7
	SEMOpx (ECC)	CR_PX	1	
	SEMOpx (DAM & IDM)	QM_PX	1	
	SEMOpx (DAM & IDM)	DP_PX	1	
Capacity & Balancing (Settlements, Credit Risk, Invoicing / Fund Transfer, Query / Disputes)	Capacity Market Settlements	SE_CM	1	Day 8
	IMB Settlements	SE_BM	1	Day 9 & 10
	SEMO (CM & IMB)	CR_SEMO	1	Day 11
	SEMO (CM & IMB)	FT_SEMO	1	
	SEMO (CM & IMB)	QM_SEMO	1	
	SEMO (CM & IMB)	DP_SEMO	1	

How to use the Curriculum – Step-by-Step Example

1. Use the Priority Map to assess which Training Topics are relevant for the type of organisation you are working in
 - *For example: if you work in a Small Supplier, “CM Bidding” and “BM Bidding and Data Submission” probably are not relevant for you*
 - *Check in the table of Learning Objectives whether the picture showed in the Priority Map reflects your organisational and individual needs*
2. Consider taking all Overview courses (self-learning materials)
 - *This is a recommended part of training for all Participants*
3. Select and register for Instructor-led Training sessions which are relevant to your type of organisation
 - *Use the Priority Map and Learning Objectives to determine whether the session will bring meaningful knowledge for you or not*

Training Materials

Self-Learning Materials

- Participating organisations will be responsible for providing their trainees with the means to open self-learning training materials in the following formats:
 - PDF files,
 - Word files,
 - PowerPoint files,
 - Movies,
 - Animations,
 - Audio files.
- Self-learning activities will focus mostly on theory. Short movie clips will also show the trainee how to use the interfaces of the I-SEM systems.

Instructor-led Training materials

- During Theory parts of Instructor-led Training sessions, paper training materials will be provided for Trainees.
- During Detail and Example parts, additional training materials will be provided to:
 - Simulate calculations and allow Trainees to experience parts of an I-SEM process (e.g. Excel spreadsheet with simple simulation/demo),
 - Equip Trainees with additional performance support materials (e.g. checklists, hand-outs, etc.).
- Selected Instructor-led Training sessions will be recorded. These recordings will be available as training materials on the Learning Management System.

All Learning Materials Available for all Trainees

- All training materials will be available for all Trainees (access to training materials will not be restricted/limited).
 - Self-learning materials and Instructor-led Training sessions will be marked with the colour codes for different target groups to allow Trainees navigate throughout the learning content library.
- All training materials will be available in the Learning Management System for Trainees at least until Go Live of the I-SEM.

Training Logistics

Milestones of the I-SEM Training Programme

- Self-learning activities are planned to take place between June and December of 2017.
 - The first set of self-learning materials will be published on the Learning Management System at the beginning of June 2017.
 - The next set of learning materials will be included on the Learning Management System as soon as they are available, but always sufficiently in advance of the corresponding Instructor-led Training session being provided. This will ensure that trainees have sufficient time to undertake the necessary self-learning, prior to a classroom session.
- Instructor-Led Training sessions are planned between mid-August 2017 and December 2017.
- All learning materials will be available for Trainees at least until Go Live of the I-SEM.

Self-learning activities

- Self-learning activities will not be tightly scheduled – it will be the Trainee's responsibility to complete the relevant parts of self-learning material in proper time.
 - Information about the availability of self-learning materials will be provided to Trainees via e-mail,
 - Reminders about any self-learning materials which an individual Trainee has failed to open and complete will be sent to Trainees via e-mail.
- Overview training (delivered as self-learning) should be completed before coming to an Instructor-led Training session.

Instructor-led Training Delivery

- Instructor-led Training sessions will be delivered as one-day long activities (with an exception of IMB Settlements which will last 2 days) distributed across a longer period of time.
 - 10 different Instructor-led Training sessions will be provided
- Instructor-led Training sessions will be delivered between 9:00 and 17:00 with a 45 minute lunch break and coffee breaks during the day.

Setting up schedules of Instructor-Led Training Sessions

- Detailed schedules for Instructor-led Training sessions will be provided until mid July at the latest.
- While planning Instructor-led Training sessions the following rules will be kept*:
 - intervals between multiple instances of the same session delivered in the same city will be no shorter than 2 weeks,
 - Instructor-led Training sessions provided in each city will not overlap to allow Trainees to participate in all sessions.
 - instances of the same session will be scheduled for different week days,
 - most of the sessions will be planned for 1 day.

** Due to project constraints (for example – availability of Subject Matter Experts) some of these rules could be modified from time to time*

High-level Timeline of Training Delivery

At least two instances of every Theory session and every Details and Examples sessions will be provided in each location at Dublin and Belfast.

	2017							2018
	Jun	July	Aug	Sept	Oct	Nov	Dec	Jan
Self-learning	Remote access to materials							
Instructor-led Training sessions				Dublin (3 instances of each Instructor-led Training session)				
				Belfast (2 instances of each Instructor-led Training session)				

** Trainees can pick (self-register for) the training session of their own choice*

Communications

High level Communications Plan of the Training

The following messages will be sent to Trainees during the I-SEM Training Programme:

Messages	Goal	When
Awareness	To build awareness of the I-SEM training programme To show the whole picture of the training process To inform about rules	Before the training process starts (June 2017 or when enrolled)
Registration	To invite to self-register for Instructor-led Training sessions	At least 4 weeks before ILT
Save the date for ILT	To place-hold Instructor-led Training session in the calendar	Before ILT – right after self-registration
Take self-learning	To ask for taking self-learning related with Instructor-led Training session	2 weeks before ILT
Invitation to ILT	To provide all the necessary logistical information related with Instructor-led Training session (when, where, etc.)	2 weeks before ILT
Training reminder	To remind about non-completed self-learning activities	In intervals during SL
Thank you	To appreciate and recognise learning effort	After completing Training Block
Information	To inform about new learning materials available To inform about changes in the learning space	When needed during the training process

Additionally, Training Programme-related communication with Training Contacts on the Participant side will be delivered on an on-going basis.

Queries

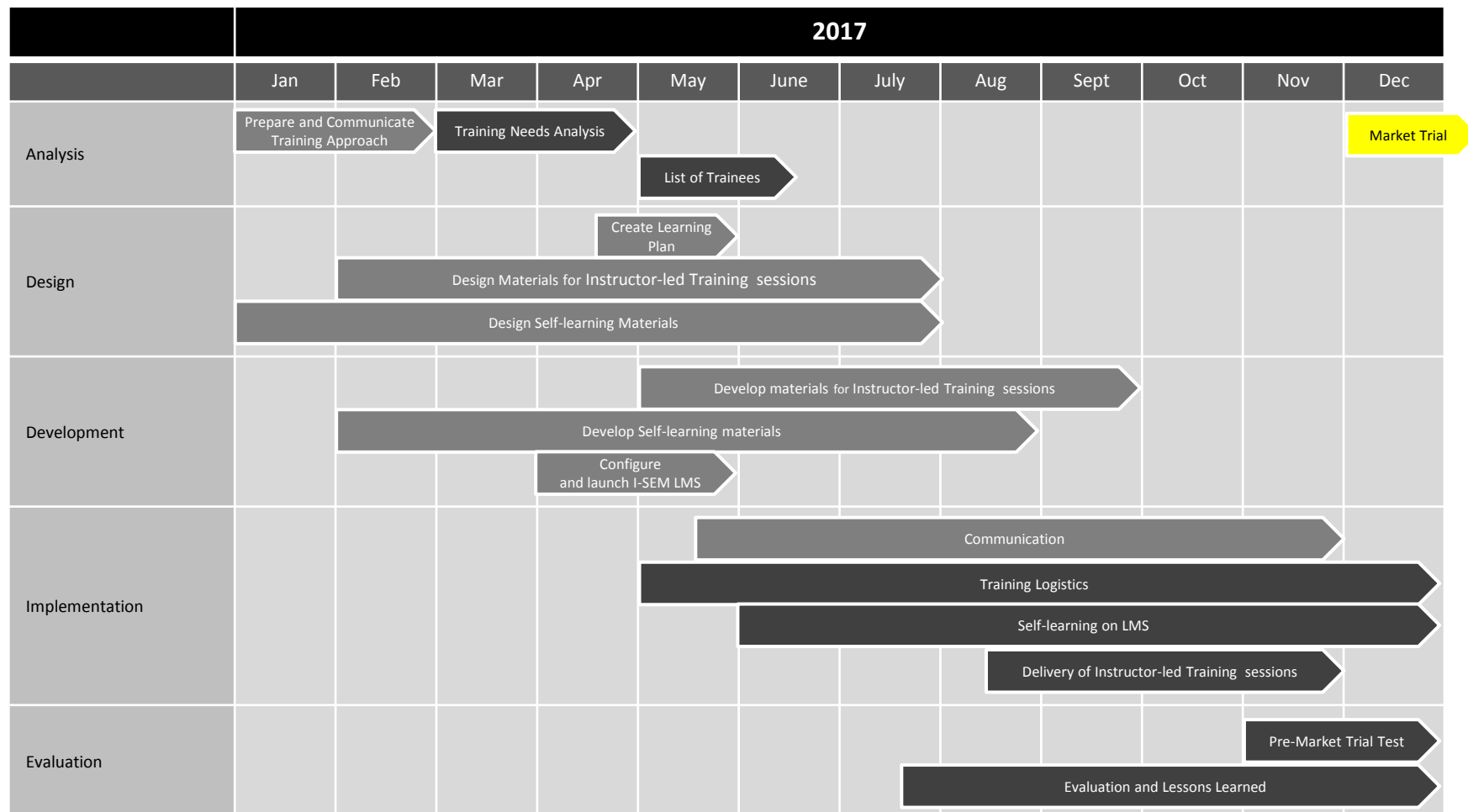
- The Query Management Process of the I-SEM Project should be used by Training Contacts to submit any questions related with the I-SEM Training Programme. The I-SEM Training Team will endeavour to reply promptly to all such queries.
- During self-learning activities subject-matter support will not be provided - all issues will be explained during Instructor-led Training sessions.

Reporting

- All learning activities, as well as the results of all quizzes concluding every Training Topic, will be monitored by the Learning Management System.
- Only the administrator from the I-SEM Training Team will have access to training statistics for all Trainees.
- The I-SEM Training Team administrator may disclose part of these statistics related with a specific participating organisation upon request.
 - A request to send such a report should be provided through the Query Management Process.

Timeline

Updated, High-level Timeline



Appendix:

Training Needs Analysis – Q&A

Surveys: Questions and Answers – 1/3

Answers / Requests / Concerns / Ideas	Response
Idea: Online resources to be made available after Go-Live	All training materials will be available for Trainee until Go Live of the I-SEM at the least.
Idea: Provide smaller/shorter workshops during Market Trial to clarify issues / resolve problems	Market Trial Working Group calls will be provided to cover this need.
Idea: Add Eirgrid Credit Calculations to Training Topics	The Training Block “Credit Risk” includes a sub-topic for SEMO (CM & IMB) which covers the Credit Calculations that will be done by an EirGrid entity as part of I-SEM.
Idea: Add REFIT to Training Topics	REFIT will not be covered as this is not an I-SEM mechanism.
Idea: Add PPA options and REFIT reference price to Training Topics	PPA options and REFIT reference price will not be covered as this is not an I-SEM mechanism.
Request: Make the LMS available on a 24 hour basis due to shift work in operations	The Learning Management System and all hosted materials will be available 24/7 (excluding any maintenance time).
Request: Provide multiple sessions for every topic needed so that all staff in a particular role are not missing at the same time	Every instructor-led training session will be repeated at least once in each location (Dublin, Belfast) to accommodate this.
Concern: Holiday season - plan and provide training timeline in advance; start early September	Instructor-led training sessions will be planned starting from the beginning of September.
Request: Provide online training as many of the relevant people required for training have very limited availability for attending in-person training courses	Self-learning materials will be delivered online; we plan to deliver Market Overview and theory materials for every Training Block in this way; the goal is to provide self-learning materials which will allow trainees to understand the I-SEM on a high level.
Concern: In small organisations the same person will have to attend all relevant trainings - they shouldn't overlap.	Relevant schedules for instructor-led training sessions will be prepared to minimize this risk.
Idea: Provide all self-learning materials to all Participants to allow them to scan over those materials which may not be as relevant	All training materials will be available for all Trainees (we will not limit access to training materials). Recommended learning paths (covering both self-learning and instructor-led training activities) will be provided for different organisations and different roles to allow Trainees to navigate throughout the learning content library.

Surveys: Questions and Answers – 2/3

Answers / Requests / Concerns / Ideas	Response
Idea: Record sessions and then share these in order to allow trainees to revisit the content (acquired knowledge could be forgotten if the time between training and actually applying the knowledge is significant)	Some training sessions will be recorded. Recorded material will be placed on the Learning Management System as training material.
Idea: Provide the option to participate in instructor led training via Lync/online solution.	On-site participation only – remote access to the training (via Lync/Skype, etc.) will not be provided.
Idea: Provide comparison between the SEM process and the ISEM process for each training so that people can put things in context.	The training team will review this to understand how easy or relevant this will be; for example, a lot of the imbalance settlement training is not comparable to the current SEM world however the processes may not be very different.
Comment: As we are a Meter Data Provider we only seek training on a high level overview of the market, registration processes & the data feeds to SEMO	Recommended learning paths (covering both self-learning and instructor-led training activities) will be provided for different organisations and different roles to allow Trainees to optimize their learning effort.
Request: Provide online support for the online training modules.	Subject-matter support will not be provided for online training modules - all issues will be explained during instructor-led sessions.
Request: Provide a programme tailored for our organisation giving an overall view and then focusing on our needs.	Recommended learning paths (covering both self-learning and instructor-led training activities) will be provided for different organisations and/or different roles to focus on specific learning needs.
Request: Provide information on what training will be provided by the I-SEM Training Team and in what format so as to allow time to develop our own additional training activities.	The I-SEM Training Team plan to publish the Training Plan at the end of May and will provide more information to Training Contacts on an on-going basis.
Idea: Provide test scenarios and simulations that Trainees can carry out themselves.	We will do our best to provide such materials in relevant training situations.
Idea: Training is progressive - i.e.. structured rollout moving from general content, to functional, then role specific.	Both self-learning and instructor-led training activities will be planned in the best possible way from a logical and structural perspective. However, due to project constraints and dependencies it may not be feasible to fully provide it in that way.
Idea: Employees should have the chance to apply new knowledge and skills in a training environment	It is not planned to provide access to Trainees from Participating organisations to IT systems before Market Trial. Important interaction with systems will be explained using visual guides/movies.

Surveys: Questions and Answers – 3/3

Answers / Requests / Concerns / Ideas	Response
Request: Any issues and concerns identified during Market Trial and after Go Live can be resolved and the outcomes communicated to all those concerned.	This request is out of the scope of the I-SEM Training Team.
Request: We need training in Cork	There are no planned training sessions outside of Dublin and Belfast.
Request: The supply of course materials and online training through Go-Live and for 3 months afterwards would assist in the development of staff who come on board after December 2017.	All training materials will be available for Trainees until Go Live of the I-SEM at the least.
Concern: The short timeframe in which to complete registration documents by the 7th August means the training and completion of registration documents is going to be a labour intensive process over the coming months, impacting on our other workload. I also question whether training on the registration process would have been more efficient if held sooner to avoid a last minute panic to make decisions on direct vs. non direct and completion of the many registration documents.	Registration-related training sessions were/are being provided outside of the regular I-SEM Training Programme.
Idea: Training refresh needed closer to Go Live; too much of a gap between November & May.	Market Trial should be treated as a natural refresher of I-SEM related knowledge and skills. Participants are requested to fully engage in Market Trial to keep track of the training process.
Idea: There should be a helpdesk available immediately prior to and during rollout.	Market Trial Working Group calls will be provided to cover this need.
Request: We want to conduct Business Acceptance Testing on new I-SEM systems in November. Training in advance of this would be most useful.	Self-learning activities are planned between June and December of 2017. Instructor-led training sessions are planned between September and December 2017.
Idea: It would be good to have dummy market runs during the sessions or online, so that participants get an idea of how things will work and what actions/factors could have an impact on the markets.	We will do our best to provide such materials in relevant training situations.
Idea: It would be really beneficial to have contact with others who are involved in organising training for I-SEM.	Monthly (bi-weekly closer to training go-live activities) Liaison Calls (hosted by the I-SEM Training Team) will also be organized to keep all Participating organisations informed.
Idea: Provide a report (per market participation) about attendance at training and the test scores related to any tests.	Engagement reports (relevant for a particular participating organisation) from the LMS will be provided to Training Contacts from this organisation on demand.

Interviews: Questions and Answers – 1/5

Answers / Requests / Concerns / Ideas	Response
Concern: Is the test mandatory? What if the Business cannot attend Training Test? What are the tests based on: theory, scenarios? What happens if people fail the test?	Tests are not an obligatory part of the training (however it is recommended to take them). They have been included in the learning journey to allow Trainees to build their confidence or identify gaps which should be closed before or during Market Trial.
Request: Training should be engaging and participative; Ideally should include scenarios and exercises not just theoretical training. Also simulations (e.g. Excel based) and games (e.g. How to be a Power Plant Operator) would be great.	Due to project dependencies it will be impossible to prepare very interactive and engaging self-learning materials. We will do our best, however, to provide participative and engaging instructor-led training sessions.
Request: Hold small seminars, video conferences, calls with participants to help remote organisations and to discuss what's working and what's not working. Aim to connect with one another and not to rehash training material.	Market Trial Working Group calls will be provided to cover this need.
Idea: Consider on-the-job learning instead of a lot of online learning.	Typical on-the-job training will not be possible due to project constraints and dependencies. Market Trial should be considered as on-the-job training.
Request: Tailor training to the different entity models in I-SEM (do not provide instructor-led training sessions where 50% of information is not relevant for the audience).	Recommended learning paths (covering both self-learning and instructor-led training activities) will be provided for different organisations and/or different roles to focus on specific learning needs.
Suggestion: Provide the training running into March to avoid people forgetting what they learned and to have a refresher.	Market Trial should be treated as a natural refresher of I-SEM related knowledge and skills. Participants are requested to fully engage in Market Trial to keep track of the training process.
Idea: Consider hands on learning approach instead of theoretical one.	It is not planned to provide access for Trainees from Participating organisations to IT systems before Market Trial. Important interaction with systems will be explained using visual guides/movies.
Idea: Provide web based training sessions to allow us to keep the 'shop running' while people attend training.	A large portion of the training will be provided as self-learning activities hosted on the Learning Management System. A high-level overview and understanding of I-SEM processes relevant to the Participants' side will be provided in this way.

Interviews: Questions and Answers – 2/5

Answers / Requests / Concerns / Ideas	Response
Idea: Provide demos to enable trainees to understand systems (e.g. During SEM, Soni provided participants with a series of spreadsheets for Imbalance Settlement which were used by trainees to play around with and to understand how the new process would work).	Such demos will be considered for relevant training topics.
Comment: Most effective types of training would be face to face (engaging workshops, Q&A sessions, interactions).	Instructor-led training sessions will be provided. Their role, however, is to respond to questions, issues and concerns which are raised after the self-learning process - for efficiency of participation in such ILT sessions it is critical to come to the sessions prepared (i.e. completion of self-learning training).
Question: Can you please inform us of the level of detail in the High-level training and all training in general? Will it provide our resources with enough information to help them learn how to transact in the new markets or will the training be very high-level?	The I-SEM Training Team will be providing information on an on-going basis. We plan to publish the Training Plan at the end of May.
Request: Video the training sessions for others to tune into after the event.	Some training sessions will be recorded. Recorded material will be placed on the Learning Management System as training material.
Request: Address the gaps - point out in Training sessions what hasn't been decided on yet for that area if this is the case.	This idea will be put forward to the Trainers; when applicable it will be used.
Request: Provide more than one opportunity to attend training split over time periods to maximise attendance of the relevant people.	Every instructor-led training session will be repeated at least once in every location (Dublin, Belfast).
Request: Provide clear information about updated documents/training materials.	The I-SEM Project is very dynamic which greatly impacts the training content space. The Training Team will do its best to keep all materials up-to-date and inform all Trainees regarding updates on on-going basis.
Request: Keep the I-SEM Training Material separate from the SEM Training Material (now all on the SEMO website).	All I-SEM Training Materials will be hosted in a separate space provided by the Learning Management System. They will not be mixed with any other project-related content nor SEM content.
Idea: Have an I-SEM Project Page - it can be difficult sometimes to find documents as the classification is difficult and some items can be missing. Suggest to classify training material in line with the Training Blocks; have 'easy-to-navigate' system.	Training materials will be organized according to functionality of the Learning Management System. They will be available in the form of personalized learning paths and in searchable form in the Training Toolkit space.

Interviews: Questions and Answers – 3/5

Answers / Requests / Concerns / Ideas	Response
Question: is there a possibility to deliver a training in Cork and Midlands as well as in Belfast and Dublin?	There are no planned training sessions outside of Dublin and Belfast.
Request: Advance Notice of Training - the more notice in terms of training - the better. Provide clear times and timeframes. Provide relevant information so that Participants can allow for the right people to attend the correct training sessions. Advance information regarding the training content and also where and when it will be available.	The I-SEM Training Team will be providing information on an on-going basis. We plan to publish the Training Plan at the end of May.
Question: Is there a possibility to train people locally onsite?	The I-SEM Training Team is not planning to provide any closed training sessions (sessions delivered to particular participating organisations).
Request: Training Material should be available online in advance of the training, during the training and in hyper care and after.	All training materials will be available for Trainees until Go Live of the I-SEM at the least. They will be also available in advance of the instructor-led training as preparation materials.
Question: Will it be possible to share the training material for people who have missed training and can it be shared in advance of the training also?	Access to training materials will not be limited - every Trainee (person enrolled to the I-SEM Training Programme) will have full access to all materials.
Idea: Prepare "Day in the Life Of" - for each role e.g. Trader in process, Analysing in a Middle Office Function. Include all interfaces, auctions and deadlines and what needs to be done for them.	EirGrid is not in a position to prepare such DILOs as it is not engaged in specific roles related with participating organisations. We do not want to be responsible for shaping daily routines when we are not an expert in them.
Suggestion: Have 1 POC / Source in I-SEM to get answers for queries from in a timely manner.	Please use the Query Management Process of the I-SEM Project to submit any training-related questions. The I-SEM Training Team will try its best to reply promptly to all such queries.
Concern: Participants will be expanding staff for I-SEM at a quick rate; there is a fear that new staff may miss the training window.	All self-learning materials will be available until the Go Live date at the least. Upskilling of new joiners will be possible based on the use of these materials and a peer-to-peer learning approach.
Question: is there a possibility to deliver a training in Cork and Midlands as well as in Belfast and Dublin?	There are no planned training sessions outside of Dublin and Belfast.
Concern: Challenge with buy-in to the training programme if first sessions are not considered to be informative / well-delivered; in such a situation it would be difficult to motivate staff to attend the remaining sessions.	We understand this risk and will do our best to provide good (efficient, participative, informative, relevant to Trainees needs) sessions for all Trainees.

Interviews: Questions and Answers – 4/5

Answers / Requests / Concerns / Ideas	Response
Concern: Risk that only a limited number of people will be able to attend training; request for short and sharp follow up conference calls.	There will be a few (at least two) training slots provided to minimize the risk of trainees not being able to attend. Trained people should be the primary source of disseminating the knowledge in the organisation.
Concern: Some of the financial staff have resource constraints around month end / year end times. If given enough notice re training, we can schedule around this.	Training schedules will be planned and announced in advance. Constrained availability of financial staff has been noted.
Request: Share any changes in the plan or new information with Participants to keep them updated and informed so that the Training Contact can coordinate the team onsite.	The Training Plan will be published and shared with Training Contacts at the end of May. All changes in the plan will be provided to Training Contacts on an on-going basis.
Idea: The Balancing Market training session for settlement that was held before Christmas was very good and interactive and used worked examples; suggestion to use this approach for training.	Thank you for this suggestion. It will be passed onto Trainers as guidance on how to deliver the training.
Request: Provide as much information as soon as possible. It was noted that there has been good content published to date.	All training content will be uploaded to the LMS as soon as it is available (note that the LMS will be open for training starting from the beginning of June). Content will also be fully available to all enrolled Trainees.
Request: Provide warnings regarding publications asap e.g. Course content and course outline. This will help with internal training planning.	The I-SEM Project is very dynamic so it is hard to predict the availability of materials in advance. We will do our best, however, to provide such information in advance.
Question: What will be done with the Training interview & survey results? Interviewees want to have an insight into the outcomes of each.	High-level results of the Training Needs Analysis will be published after anonymization of responses (please treat this document as such a publication).
Concern: For Assetless Traders – the owners of the Assets are very unaware of what I-SEM is. How do we train them in relation to what is happening?	The I-SEM Training Programme will be provided using three steps: (1) Market Overview training (self-learning), (2) High-level overview of specific business processes (self-learning) and (3) Instructor-led training which will allow trainees to operationalize knowledge acquired during the self-learning process. Trainees will be able to choose what level of learning and what Training Blocks (business processes) they would like to take. To build awareness, the first step of this process should be sufficient.

Interviews: Questions and Answers – 5/5

Answers / Requests / Concerns / Ideas	Response
Concern: if the Systems coming in the BM mechanism system and EPEX API are very much directed at using Java as your language. If we have a different approach e.g. .NET - would there be training for that? Also how high level would the training be from a technical sense - would there be IT training directed to .NET and Java? The Java Toolkit will be released in May. Is there a possibility for a .NET Toolkit? Will there be training for EPEX or is this up to the client individually?	IT-related issues and topics are out of scope of the I-SEM Training Programme (which focuses on the rules of the market). Trainees are advised to make contact with IT vendors who can respond to this question and (if needed) provide necessary training.
Concern: Is training mandatory for all traders? In other words, is training mandatory for Traders to receive going into I-SEM or just for the company to receive? Please explain how and if training is mandatory for resources / company / I-SEM?	I-SEM training is not mandatory for any role or any organisation. We suggest, however, to engage in the training which will be provided to help understand the I-SEM processes and to become a fully aware Participant of the market.
Concern: There is a risk regarding FTR Trading and how we can model them from a pricing point of view. The modelling requires historic information to work however there will be no historic information available. Please include information in relation to this in training.	This concern is not related with the I-SEM Training Programme which focuses on rules and not on the business of Participating organisations. We suggest, however, to research other markets which may help to model your response.

Appendix:

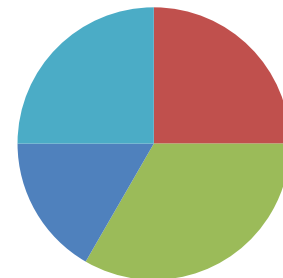
Summary of Quantitative Data
from Training Needs Analysis
for Participants

Respondents of the Survey

Type of Organisation	Number of responses
Supplier	11
Generator	17
DSU Generator	6
ICU Trader	7
Other	6
<i>* More than one choice could be done</i>	

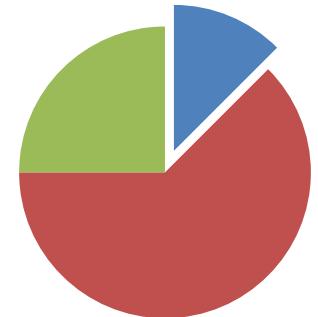
Declared Number of People to Train

Declared Number of People to Train	Breakdown of responses	
0	0	0%
1-3	6	25,0%
4-10	8	33,3%
11-20	4	16,7%
20+	6	25,0%



Format of the Training

Format of the Training	Breakdown of responses	
One long block within a week	3	12,5%
Multiple one-day long sessions spread over an extended period	15	62,5%
Both options are satisfactory	6	25,0%

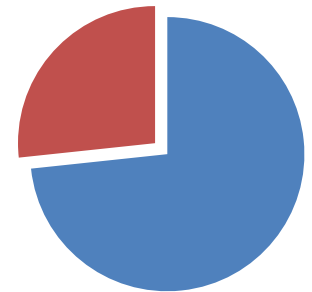


Decision:

Training will be delivered in multiple one-day long sessions spread over an extended period (aligned with needs of almost 90% of respondents)

Place of the Training

Place of ILT Delivery	Declared number of people to be trained	
Dublin	283	73%
Belfast	103	27%
<i>* Other places not considered</i>		



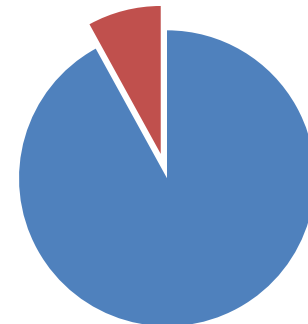
Decision:

Training delivery will be calculated splitting the training between Belfast and Dublin in proportion of 73% for Dublin and 27% for Belfast

Confirmation of Blended Learning Approach

Blended Learning defined in the Training Approach	Breakdown of responses	
OK	23	92,0%
Not OK	2	8,0%

** 2 responses marked as "Not OK" were not provided (so technically they are neither "OK" nor "Not OK")*



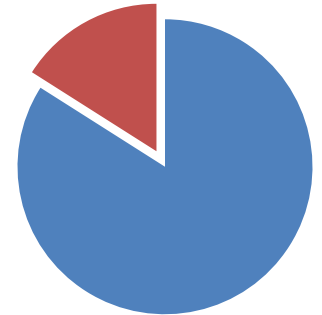
Decision:

Blended learning based on self-learning preparation for participation in the instructor-led training workshop will be used as a common approach in the Training Plan.

Technical capabilities – Access to LMS

Access to Learning Management System	Breakdown of responses	
Confirmed	21	84,0%
Not Confirmed	4	16,0%

** 4 responses marked as "Not OK" were not provided (so technically they are neither "Confirmed" nor "Not Confirmed")*

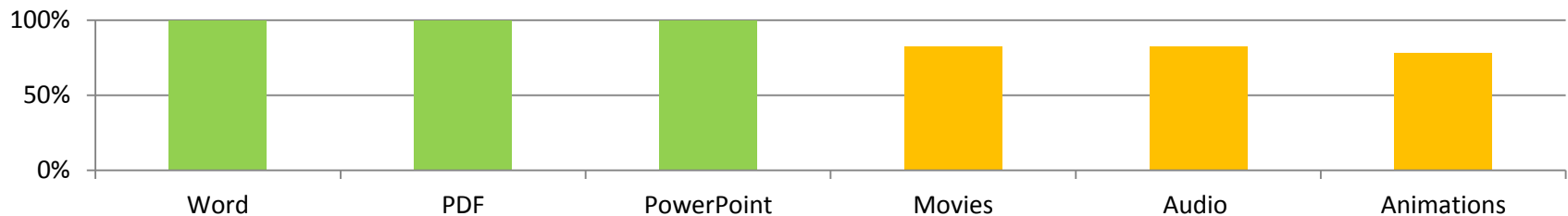


Decision:

The Learning Management System will be used as a core solution for scheduling and delivering self-learning materials. All Participants will be asked to secure access to the LMS for all Trainees on their side.

Technical capabilities – Ability to View Files

Ability to View Files	Breakdown of responses (total number = 23)	
Word	23	100%
PDF	23	100%
PowerPoint	23	100%
Movies	19	83%
Audio	19	83%
Animations	18	78%



Decision:

Self-learning materials will be delivered using multiple media formats focusing on PDFs. Some formats including movies and audio files will also be used.