

PERFORMANCE DEMONSTRATION REPORT (PDR)

OJT TRAINER SKILLS CERTIFICATION CANDIDATE INFORMATION

Candidate:

Name: (Please Print) _____

Mailing Address: _____

City _____ State _____ Zip _____

Candidate's Employer:

Company Name: (Please Print) _____

Mailing Address: _____

City _____ State _____ Zip _____

Contact Information: Voice # _____

Sponsor:

Name: (Please Print) _____ Title _____

E-mail Address, if available: _____

PERFORMANCE DEMONSTRATION REPORT (PDR) OJT TRAINER

This **Performance Demonstration Report (PDR)** is the official report for documenting successful performance in meeting NIMS requirements for the credential identified above. The PDR should be used with the information regarding policies and procedures for credentialing as provided by NIMS.

Who is involved in completing this PDR?

NIMS requires that each candidate for a credential have a **sponsor** from the metalworking company in which he/she is employed. The sponsor is an individual authorized to represent the company, especially in personnel matters, and serves as the liaison between the company and NIMS. The sponsor has responsibilities for record keeping and reporting to NIMS, coordinates the credentialing process within the company, and is required to sign-off on certain documents in the PDR.

The candidate's **supervisor** needs to be informed as to the credentialing process, know the specific requirements of the PDR, and must sign-off on the Work History and Experiences component of the PDR.

The performance **evaluator** can be the candidate's supervisor or an in-plant expert in machining operations who is considered to be competent in OJT, fair and reliable, and have effective communication skills. The evaluator uses direct observation of the on-the-job performance of the candidate to complete the skill checks of the PDR and to attest that the candidate [1] was able to satisfy the standards included in the skill checks, and [2] followed all applicable company training program policy and procedural guidelines.

As appropriate, the evaluator can be the candidate's supervisor or the company's credentialing sponsor. However, the same individual **cannot** serve in all three capacities [evaluator, sponsor, and supervisor].

What is the role of the PDR?

The PDR provides the company and candidate with a record (or logbook) of observed on-the-job performance. A completed PDR is also the vehicle that will allow eligible candidates to take the NIMS written examination for the above credential. All parties involved in executing this PDR, whether supervisors, sponsor, evaluator, or candidates, should take care of this record and be sure that it is accurate, kept up to date, filled out correctly, and properly stored. All information recorded in the *PDR* should be considered **CONFIDENTIAL**.

Candidates may attempt to earn several credentials as applicable to the company and facility in which they work, or as appropriate to the job, or in pursuit of career goals.

How is the PDR structured?

There are three components to this PDR:

1. Report on Work History and Experience
2. Skill Checks
3. Affidavit of Successful Completion.

The PDR opens with a form to report the candidate's Work History and Experiences; all elements of this report must be acknowledged and documented.

The actual work performance required for the credential is assessed by an evaluator who observes the skills of the candidate in real work settings. Skill Checks required for credentialing are clearly marked with the title - **PDR SKILL CHECK**. Each Skill Check must be successfully completed. **Three** skill checks involving three different on-the-job training assignments with three different tasks, individuals or small groups are required to assure repeatability of demonstrated skill.

The PDR sets forth methodologies and standards for each competency area. The company may add to these methodologies and standards to conform to its OJT training program, policies and procedures. Any changes should be noted in the space provided for the competency and signed off on by the evaluator and supervisor as part of the documentation of the specific proficiencies or competencies developed through the OJT training. Because the PDR is a process that occurs over time, these Skill Checks provide documentation of the attained skills of the candidate.

Once the PDR has been completed, then what?

The final component of the PDR is the Affidavit of Successful Completion. Each **successful** Skill Check attempt must be entered into this affidavit and signed/initialed by the evaluator. When all skill checks have been fulfilled and the Work History and Experiences report is completed, then the affidavit must be signed by all required parties –Sponsor, Supervisor, Evaluator, and the Candidate.

The **entire** PDR is then sent to NIMS where it is reviewed to assure completeness. NIMS will retain the Affidavit of Successful Completion as its required documentation that performance requirements for the credential have been met. The PDR, less the affidavit, is then returned to the Credentialing Sponsor who then schedules a time with NIMS for the written exam for the credential.

For additional information about administering *PDR* Skill Checks contact NIMS.

Part 1

WORK HISTORY AND EXPERIENCES REPORT OJT TRAINER

Duty Cluster and Critical Work Activities	Date Completed	Supervisor Initials	Candidate Initials
Candidate has met the attendance policy of the facility for the last 12 consecutive months.			
Candidate has no company documented safety violations within the last 12 consecutive months.			
Candidate has demonstrated the ability to maintain a safe, clean and orderly work area in compliance with facility housekeeping policies and has no reported violations for a period of three (3) consecutive months.			
Candidate has demonstrated subject matter expertise (knowledge and skills) at the required level for the job/area in which the OJT training is to be done.			
Candidate has demonstrated competency when directing the work of others and/or delivering some training to coworkers			
Candidate has demonstrated competency in working with others as adult learners and has fostered an environment of continuous learning and process improvement.			
Candidate has demonstrated coaching skills consistent with the position and level of responsibility.			
Candidate has demonstrated communication skills consistent with the position and level of responsibility.			

Please Note:

All of the above elements of work history and on-the-job experiences must be met.

Part 2

PREPARING TO ADMINISTER THE SKILL CHECK OJT TRAINER

Performance Conditions

Setting: **OJT Observations.** Given an OJT assignment, the candidate will review the company prescribed OJT training plan and materials. The candidate will implement that plan as specified with OJT trainee(s) using a show tell-do-check type training approach. The candidate will demonstrate competencies in communication skills, coaching and working with adult learners in the process of plan implementation. The candidate will perform the plan and demonstrate these competencies to the prescribed NIMS minimum standards - or better, as they relate to the OJT training assignment prescribed by the company. The candidate will review the performance of the OJT trainees and inspect the manufactured parts [verify product quality] according to prescribed company polices and safety procedures.

Training Material

OJT Training Plan

As specified in OJT training plan

Equipment And Measuring Instruments

Safety

Safety Equipment:

As specified in OJT training plan

Tools, Equipment, and Materials:

As specified in OJT training plan

Measuring Instruments

As specified in OJT training plan

Attainment Standards

- 100% of OJT plan implemented as specified, without assistance
- within the company allotted time frame
- 100% compliance with competency standards for communications skills, coaching and adult learning
- 100% conformance with all plant training policies and procedures
- 100% conformance with all plant safety procedures.
- 100% conformance with all company production procedures.

Candidate Directions

The Company supplied OJT Training Plan, checklists, and the tools, equipment, materials and supplies required will be used to conduct the training as specified. All plant safety procedures and company training policies and procedures **must** be followed. The final result of the OJT assignment namely the performance of OJT trainees and the parts they produce will be evaluated.

Evaluator Instructions

For successful completion of this skill check, the candidate must demonstrate the ability to complete the OJT assignment under controlled assessment conditions. All work must be completed to the established standards, or better.

Before administering the skill check:

Read and review this **PDR**.

Ensure that you have a copy of this Skill Check for the candidate to use while working. Ensure that all applicable equipment and supplies are training materials are available. Ensure that OJT trainees are present and able to participate in the training assignment.

Do **not** provide assistance to the candidate during the Skill Check. Monitor the candidate's performance throughout the OJT training assignment and evaluate against established criteria [NIMS or company standards].

Stop the Skill Check immediately if the OJT training candidate or an OJT trainee violates a safety regulation or procedure, or if there is any possibility of personal injury or damage to equipment!

Before starting, the Evaluator may discuss appropriate OJT trainer issues or information and company training requirements with the candidate.

When the candidate indicates that he/she has completed the Skill Check, or when the maximum time allowed for the OJT training assignment by the company has expired, then assess the final results to that time and follow the closing procedures outlined in the Guide to Administering Performance Demonstration Reports.

Checklist

Scoring Procedures: First review all the Process/Performance Standards. Then, observe the candidate's performance for each element in the Skill Check and mark the Checklist if the standards were attained [Yes or No]. Note that the results must conform to the NIMS or company-established minimum standards.

Performance Demonstration Report

Training Demonstration _____

Competency	Process-Performance Standards	YES	NO
Planning & Preparation	Reviewed OJT training plan, checklist or company tool		
	Modified plan as required		
Module 1. Training Methodology	Prepared to conduct training (e.g., dry run, walk through)		
	Assembled all necessary equipment and equipment for training		
	Determined trainee's prior experience		
	Showed the trainee how to do the job - demonstrated proper procedures and behaviors		
	Told the trainee how to do the job - explained the more complex or difficult aspects of job and emphasized correct methods including safety		
	Had the trainee perform the job (either simple parts first or whole job -depending on job difficulty) - asked questions to confirm knowledge and understanding during skill application tasks and had trainee repeat task, as required		
	Checked the trainee's performance of tasks - evaluated the performance of the trainee and inspected the results		
	Acknowledged what was done correctly and gave feedback on what needed to be improved		
	Completed trainee checklist/company training report and had trainee sign		
Module 2. Communication	Precise Message Transmission: organized and presented material well. Explained all new and unfamiliar terms. Was accurate, brief and clear in communications.		
	Active Listening: focused body language and tone of speaker as well as words to ensure understanding of communications		
	Describing Behavior: stated clearly what the trainee was doing correctly and incorrectly		
	Checking for Understanding: asked probing questions to ensure that the instruction was understood		
	Paraphrasing: stated in own words what trainee said		
	Providing Feedback: evaluated trainee performance and gave assessment, assistance and information in a constructive and positive way to facilitate trainee's development (See coaching below)		

Module 3. Coaching	Instructor: transferred the requisite job knowledge, skills and processes to the trainee		
	Evaluator: set goals, created development plans and evaluated the progress of the trainee		
	Motivator: established a positive learning environment for and built the confidence of the trainee		
	Counselor: helped the trainee deal with work-related performance problems which might impede success on the job		
Roles	Was descriptive rather than judgmental		
	Was specific rather than general		
	Was timely		
	Focused on the job process and behavior that the trainee could change		
	Was balanced - identified both the positive and negative aspects		
	Considered the needs of the trainee - was delivered in a constructive manner		
	Prioritized the areas in which the trainee needs to improve		
Module 4. Adult Learner	Treated the trainee as an adult		
	Transmitted required information simply and directly		
	Emphasized and explained how the learning can be applied		
	Related the training to the goals of the trainee		
	Took the prior experience of the trainee into account in delivering the training		
	Maximized the opportunity for two-way communications and exchange of information and ideas during the training		
	Listened to and respected the opinions of the trainee		
	Provided positive reinforcement to the trainee		
	Encouraged the trainee to be a resource to himself and other workers		

FINAL PERFORMANCE STANDARDS

- The OJT Training Assignment is done as expected when:**
- The candidate's performance met or exceeded NIMS OJT standards, as modified to conform to company requirements.
 - The candidate performed all of the process steps proficiently according to company OJT training plan
 - The candidate recorded accurate and legible information/data on all training forms, information sheets, reports, checklists, etc.
 - The Candidate demonstrated ability to deal with trainees in a positive and constructive manner.
 - The trainees performed the job and produced the parts required satisfactorily.
 - All safety and plant procedures were followed and the work area was left clean.

Evaluator _____ **Date:** _____

Candidate _____ **Date:** _____

Performance Demonstration Report

Training Demonstration _____

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	Modified plan as required		
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	Had the trainee perform the job (either simple parts first or whole job -depending on job difficulty) - asked questions to confirm knowledge and understanding during skill application tasks and had trainee repeat task, as required		
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Module 2. Communication	Precise Message Transmission: organized and presented material well. Explained all new and unfamiliar terms. Was accurate, brief and clear in communications.		
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Roles	Was descriptive rather than judgmental		
	Was specific rather than general		
	Was timely		
	Focused on the job process and behavior that the trainee could change		
	Was balanced - identified both the positive and negative aspects		
	Considered the needs of the trainee - was delivered in a constructive manner		
	Prioritized the areas in which the trainee needs to improve		
Module 4. Adult Learner	Treated the trainee as an adult		
	Transmitted required information simply and directly		
	Emphasized and explained how the learning can be applied		
	Related the training to the goals of the trainee		
	Took the prior experience of the trainee into account in delivering the training		
	Maximized the opportunity for two-way communications and exchange of information and ideas during the training		
	Listened to and respected the opinions of the trainee		
	Provided positive reinforcement to the trainee		
	Encouraged the trainee to be a resource to himself and other workers		

FINAL PERFORMANCE STANDARDS

The OJT Training Assignment is done as expected when:

- The candidate's performance met or exceeded NIMS OJT standards, as modified to conform to company requirements.
- The candidate performed all of the process steps proficiently according to company OJT training plan
- The candidate recorded accurate and legible information/data on all training forms, information sheets, reports, checklists, etc.
- The Candidate demonstrated ability to deal with trainees in a positive and constructive manner.
- The trainees performed the job and produced the parts required satisfactorily.
- All safety and plant procedures were followed and the work area was left clean.

Evaluator _____ **Date:** _____

Candidate _____ **Date:** _____

Performance Demonstration Report

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Roles			
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	Was balanced - identified both the positive and negative aspects		
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	Related the training to the goals of the trainee		
	Took the prior experience of the trainee into account in delivering the training		
	Maximized the opportunity for two-way communications and exchange of information and ideas during the training		
	Listened to and respected the opinions of the trainee		
	Provided positive reinforcement to the trainee		
	Encouraged the trainee to be a resource to himself and other workers		

FINAL PERFORMANCE STANDARDS

<p>The OJT Training Assignment is done as expected when:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The candidate's performance met or exceeded NIMS OJT standards, as modified to conform to company requirements. <input type="checkbox"/> The candidate performed all of the process steps proficiently according to company OJT training plan <input type="checkbox"/> The candidate recorded accurate and legible information/data on all training forms, information sheets, reports, checklists, etc. <input type="checkbox"/> The Candidate demonstrated ability to deal with trainees in a positive and constructive manner. <input type="checkbox"/> The trainees performed the job and produced the parts required satisfactorily. <input type="checkbox"/> All safety and plant procedures were followed and the work area was left clean.
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Evaluator _____ **Date:** _____

Candidate _____ **Date:** _____

AFFIDAVIT OF SUCCESSFUL COMPLETION OJT TRAINER

Candidate _____ Date: _____

Directions: This page is a compilation of all the performance requirements for the OJT Trainer credential. This affidavit documents that the candidate has successfully completed all performance requirements; that is,

- the Work History and Experiences report has been met,
- all three Skill Checks have been completed and standards attained,
- all Final Performance Standards have been attained.

All parties involved in assuring that the documentation contained in this PDR is accurate and complete must sign the affidavit. When this affidavit is completed, it should be sent **in its entirety** to NIMS at the indicated address.

All Work History and Experience Requirements Have Been Met	Date of Completion:	Supervisor's Initials:
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Nature of OJT Training Assignment	Date of Completion
PDR 1:	
PDR 2:	
PDR 3:	

Evaluator's initials confirm that Candidate has demonstrated proficiency in each of the OJT Trainer competency areas in completing the 3 PDRs	PDR 1	PDR 2	PDR 3
1. OJT Training Plan Review			
2. OJT Training Plan Implementation			
3. Communication Skills			
4. Coaching			
5. Adult Learning			

FINAL PERFORMANCE STANDARDS

Directions: After reviewing all PDR SKILL CHECKS, check the boxes ONLY if all OJT Training Assignments have met these performance standards.

The OJT Training Assignment is Done As Expected When:

- The candidate's performance met or exceeded NIMS OJT standards, as modified to conform to company requirements.
- The candidate performed all of the process steps proficiently according to OJT training plan
- The candidate recorded accurate and legible information/data on all training forms, information sheets, reports, checklists, etc.
- The Candidate demonstrated ability to deal with trainees in a positive and constructive manner.
- The trainees performed the job and produced the parts required satisfactorily.
- All safety and plant procedures were followed and the work area was left clean.

We do hereby attest with our signatures that the candidate named above has completed all necessary PDR requirements for the OJT credential:

Evaluator's Signature

Date

Sponsor's Signature

Date

Supervisor Signature

Date

Candidate Signature

Date

COMMENTS:

Make a copy of the completed *Affidavit of Successful Completion* for your records and send this entire PDR to:

The National Institute for Metalworking Skills

OJT TRAINER

10565 Fairfax Blvd, Suite 10

Fairfax, Virginia 22030

Fax: 703.352.4991 | www.nims-skills.org