



**Division of Occupational Safety and Health
POLICY AND PROCEDURES MANUAL**

P & P C-12

**PROFESSIONAL DEVELOPMENT
AND TRAINING**

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POLICY: It is the policy of the Division of Occupational Safety and Health to establish and support a Professional Development and Training Program that is administered by the Professional Development and Training Unit (PDTU). The goal of this Program is to assist Compliance Safety and Health Officers (CSHOs) and their supervisors with direction, guidance, and training options that directly contribute to the CSHO's ability to represent DOSH with a high degree of professional expertise.

PROCEDURES:

A. OVERVIEW

The Division's training program provides a wide range of training opportunities and learning experiences to assist CSHOs with their professional development. A flexible program that incorporates self-study, on-the-job experiences and formal training has been developed to accommodate the varying levels of experience and competence within the Division.

1. Technical Training

The program's flexible yet structured approach to curriculum meets the needs of CSHOs with highly diverse academic backgrounds and experiences. Supervisors and managers are encouraged to incorporate their office's training priorities into the CSHOs training program. For example, the needs of the District or Area Office may dictate that new CSHOs receive technical training in industrial noise or machine guarding within their first year. The training program offers District and Regional Managers the opportunity to incorporate up to four additional technical courses at any time during the CSHO's initial three year training plan provided the CSHO has completed both the Initial Compliance and one of the Standards courses. Selection of the technical courses to be attended and determination of the sequencing and priority are at the Regional Manager's discretion, based upon recommendations of the District Managers.

2. Professional Certification

The progression of training requirements for a CSHO's career supports the pursuit of professional certification and encourages CSHOs to strive for the recognition that such certification provides. Since PDTU courses are designed to support the Division's mission, there may not always be a one-to-one correlation between a PDTU technical course and the competencies required to achieve certification.

B. FIRST THREE YEARS OF CSHO TRAINING

1. The following two courses must be completed early in a CSHO's career. Although these courses are required, there is no limit to the number of courses a CSHO may take during any year.

- a. Initial Compliance Course
- b. One of the following courses on Title 8 Standards:
 - (1) Introduction to Safety Standards
 - (2) Introduction to Health Standards
 - (3) Introduction to Construction & Electrical Standards

2. The following courses will be taken after the CSHO has completed one of the Standards courses:

- a. Investigative Interviewing Techniques
- b. Inspection Techniques and Legal Aspects

NOTE: The Inspection Techniques and Legal Aspects course is the only course that cannot be waived per Section G.

- c. Accident Investigation

3. The following courses will be taken during a CSHOs initial three-year period to enhance multi-disciplinary competence.

- a. Safety and Construction career path CSHOs will take the following:

- (1) Introduction to Health Standards
- (2) Introduction to Construction & Electrical Standards

- b. Health career path CSHOs will take the following:

- (1) Introduction to Safety Standards
- (2) Industrial Hygiene Sampling

4. All CSHOs will attend the Incident Command System I-200 course, or equivalent training (i.e., course conducted by other governmental agencies or web-based course) this must be taken during the initial three years of training.

C. ORGANIZATIONAL RESPONSIBILITIES

1. Division Headquarters

The Division leadership shall support the training program by providing resources, and by establishing manager performance standards to ensure appropriate training is received by all employees affected by this policy. Division leadership shall also provide direction to the PDTU and update the PDTU staff about the status of Division programs.

2. Professional Development and Training Unit

The PDTU shall be responsible for providing programs to educate and train DOSH compliance and consultation personnel in the skills and knowledge required to perform their duties. Responsibilities include:

- a. Planning, developing and conducting technical and specialized training courses and seminars;
- b. Overseeing and conducting courses and seminars for State compliance officers, consultants, and other DOSH personnel;
- c. Participating in the design and development of technical and specialized courses, including development of course materials, detailed lesson plans, and other educational aids necessary to carry out designated training programs;
- d. Conducting needs assessments and gap analyses to identify training needs for compliance and consultation personnel;
- e. Developing classroom and technology-enabled training products designed to support the training and development of CSHOs;
- f. Conducting evaluations of training courses and programs designed for compliance personnel;
- g. Maintain records of all training received by DOSH personnel and classes waived for individuals.

3. Professional Development and Training Advisory Committee

The Division shall establish a Professional Development and Training Advisory Committee (Steering Committee) to make recommendations to the Division concerning the mission, functions, policies, planning, and resources of the Professional Development and Training Program.

4. Regional Office

- a. The Regional Managers and the Consultation Service Managers shall implement the Division's Professional Development and Training Program in each of the district and area offices of the state.
 - b. The Regional/Consultation Service Managers shall:
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- (1) Provide guidance and assistance to the District and Area Offices concerning information contained in this P&P.
- (2) Assist in providing resource material and current training information to District and Area Managers concerning implementation of the objectives of the Professional Development and Training Program.

5. Regional Training Coordinators

- a. Shall serve as a focal point for each region, assisting the Regional Manager and the PDTU in coordinating the Region's training and education programs;
- b. Will be the primary point of contact for training course registration and shall process training requests, and provide training registration information to managers, supervisors and CSHOs.

6. District/Area Office

- a. The District/Area Manager shall:

- (1) Ensure the developmental training of all newly hired, and the training of all experienced, CSHOs under the manager's supervision;
- (2) Identify and document through an Individual Development Plan (IDP) process the training needs of CSHOs assigned to his/her supervision, and plan and coordinate all training. Request waivers for experienced persons who have had equivalent or related training;
- (3) Provide assistance and guidance consistent with the IDP process to allow CSHOs to meet the Professional Development and Training Program objectives as outlined in this P&P;
- (4) Review and discuss training progress with each CSHO under the manager's supervision on a regular basis and with an official report due after each evaluation period;
- (5) Assign a mentor to new CSHOs to assist with on the job training for new staff;
- (6) Communicate training needs to Regional Training Coordinator.

7. Compliance Safety and Health Officer (CSHO)

- a. The CSHO shall:

- (1) Discuss their performance and training progress with their supervisors;
 - (2) Participate in the planning and tracking of their training activities;
 - (3) Fully attend, participate in, and complete all assigned training courses, seminars and other events.
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D. PROFESSIONAL DEVELOPMENT DURING CSHO'S FIRST THREE YEARS

1. Required Training

In the interest of statewide consistency, it is expected that CSHOs will attend the required courses outlined in this instruction.

2. Course Sequence

Both the Initial Compliance course and a Standards course are to be completed in the first year of the CSHO's training path. It is recommended that subsequent courses be completed in a sequence optimal to attaining professional development goals and at the discretion of the supervisor.

a. Initial Compliance Course

This course is designed for newly hired CSHOs and focuses on the basic elements of conducting inspections in accordance with current DOSH policy. Also emphasized is the importance of personal conduct and professional development. Role-play is used to allow students to practice how to conduct an opening conference. The course ensures that participants have the fundamentals of information gathering to document the prima facie elements in a case file. At the conclusion of this course, the student will be able to identify CSHO responsibilities related to conducting an inspection as well as promoting, assessing and enforcing workplace safety and health compliance.

b. Standards Courses

The purpose of these courses is to provide CSHO's with an introduction to the organization and content of the standards, hazard recognition, and documentation of identified hazards.

(1) Introduction to Safety Standards

This course is designed specifically for safety officers and emphasizes a wide range of safety hazards covered by CCR Title 8. At the conclusion of the course, the student will be able to apply inspection techniques, basic safety hazards recognition and abatement for inspections.

(2) Introduction to Health Standards

This course is designed specifically for health specialists and emphasizes recognition, evaluation and control of a wide range of health hazards covered by CCR Title 8. At the conclusion of this course, the student will be able to employ basic health hazard recognition; apply inspection sampling and instrumentation techniques and related OSHA policies; and identify abatement methods.

(3) Introduction to Construction & Electrical Standards

This course is designed specifically for safety officers who will conduct construction and electrical inspections to become familiar with these standards in CCR Title 8. At the conclusion of the course, the student will be able to recognize basic construction and electrical hazards, and identify abatement methods.

c. Investigative Interviewing Techniques

This course is intended to serve as a practical interviewing guide for OSHA compliance personnel. A major component of this course includes role-play using scenarios that provide the opportunity for students to practice interviewing skills. The course emphasizes developing a plan for gathering the necessary facts, characteristics of good questioning techniques, active listening, and cross-cultural communication.

d. Legal Aspects and Appeals

This course introduces the student to formal requirements and processes of the legal system. Emphasis is placed on documenting a legally sufficient case file. This course includes the essential elements of conducting walk around inspections and interviews, and analyzing, organizing and documenting information related to inspections and investigations. Students develop a sample legally defensible case file and participate in a mock trial as the culminating learning experience. This course cannot be waived, and is recommended even for experienced personnel.

e. Accident Investigation

This course covers the key elements that are essential to conducting successful accident investigations. Major topics include investigation planning, documenting the scene, collecting facts through interviewing, failure analysis and analytical tools, collecting and analyzing physical evidence, and control strategies. Using a case file and interactive class workshops, students work in teams to gather and analyze evidence to develop facts, findings and conclusions.

f. Incident Command (I-200 or equivalent)

When responding to an identified incident, the CSHO will be able to operate efficiently within the parameters of an Incident Command System (ICS).

E. PROFESSIONAL DEVELOPMENT FOR CSHOs AFTER YEAR 3

1. Technical Training Requirements – Each CSHO will be required to complete a minimum of six additional technical courses through Year 8 of their career. Beginning with Year 9, they must complete a minimum of one technical course every three years. Specifically, four technical courses should be completed by the end of Year 5. Two technical courses shall be completed in Years 6 through 8. A minimum of one technical course shall be completed every three years beginning with Year 9 throughout the CSHO's career.

F. MONITORING THE TRAINING PROGRAM

Monitoring the CSHO's progress through the first three-year period is critical to ensure the success of the training program. Monitoring provides information regarding the benefits and effectiveness of the training received. In addition, it provides information on the ability of the CSHO to achieve training goals and

objectives.

1. The District/Area Manager shall:

- a. Ensure that each CSHO has completed the necessary prerequisites before attending mandatory training courses;
- b. Review the CSHO's performance of recommended self-study and on-the-job training (OJT) assignments;
- c. Conduct a review with the CSHO following each recommended self-study and OJT inspection activity. This review provides the supervisor with information on the progress of the CSHO and can assist in identifying areas requiring further training;
- d. Determine when the CSHO has sufficient experience to participate fully in developing the actual case file; the OJT review may be discontinued when this has been effectively accomplished.

G. INDIVIDUAL DEVELOPMENT PLANS (IDP)

1. Role of Individual Development Plans.

An Individual Development Plan (IDP) is an active plan to help the CSHO achieve organizational and career goals. IDPs must be updated annually and serve as a tool to provide documentation for each CSHO to chart and monitor his/her own progress toward developmental goals. An IDP can help a CSHO:

- a. Achieve and enhance the level of knowledge and skills required to achieve the functional competencies of a CSHO;
- b. Build expertise as a DOSH safety and health professional;
- c. Continue professional development throughout his/her career.

2. IDPs for the Initial Three-Year Period

Attachments A and B serve as guidelines for supervisors to select appropriate training outlined by this instruction during the first three years. They should reflect:

- a. Mandatory training required during the three-year period as outlined in this instruction;
- b. Other developmental training as determined by the CSHO's supervisor. For example:
 - (1) Supplemental training at the Regional and District Office level that includes formal and/or informal mentoring by higher graded personnel and/or CSHO's with specialized experience;
 - (2) Participation in various classes of inspections and a variety of industries and worksites.

3. IDPs Developed after the Three-Year Period

- a. An IDP helps the CSHO continue to improve his/her present performance and prepare him/her for more responsible work in accordance with his/her potential and interests, and the needs of the Division.
- b. By the end of Year 5, each CSHO must have attended four technical courses in addition to the courses outlined in D above. The IDPs developed during these years should reflect this requirement.
- c. In years 6 – 8, CSHOs shall attend at least two additional technical courses.
- d. After year 8, each CSHO is required to attend a safety and health related course once every three years. More frequent course attendance is recommended.
- e. IDPs shall be developed by CSHOs and their supervisors by utilizing personal performance objectives, the employee's career interests and goals, and the future needs of the Division.

4. IDP Components

- a. An individual Development Plan (IDP) is an annually prepared activity plan which includes:
 - (1) Training Needs Assessment;
 - (2) On-the-job training (OJT) assignments (see Section H); and
 - (3) Formal training courses, including any mandatory training requirements (see Section G).

5. IDP Focus

- a. IDP's shall be designed to improve current job performance, acquire or maintain technical knowledge and skills, and prepare for promotional examinations. The IDP is not limited to developing technical skills, some employees need help in written communication, oral communication or effective listening which also needs to be addressed.
- b. After initial development, IDP's shall be reviewed on an annual basis by employees and their supervisors to evaluate progress and to determine the need for additional training or development.
- c. IDP's do not guarantee an employee any particular training opportunities, but represent a mutually agreed upon plan of action for an employee's development.

H. PROFESSIONAL DEVELOPMENT PROGRAM FOR NEWLY HIRED CSHO'S

1. Purpose

The purpose of a professional development training program for newly hired CSHO's is to provide them with a broad range of training opportunities and learning experiences to ensure their successful professional development.

2. Goals

a. The PDT Unit shall ensure that a flexible program is developed for all new CSHO's which:

- (1) Emphasizes self-paced learning to accommodate varying levels of professional experience;
- (2) Incorporates essential curricular requirements that can be easily evaluated by supervisors; and
- (3) Provides guidance and appropriate training materials to supervisors.

3. Organization

- a. Each Regional and Area Manager shall submit the names of newly hired CSHOs to the PDT Unit at the time of hire.
- b. The PDT Unit staff shall, in coordination with the supervisor enroll each newly hired CSHO in the next available sequence of mandatory courses and provide the District/Area Manager with a schedule of classes in which each new hire is enrolled.

4. Developmental Training Program Curriculum

a. One Year Development Training Program

- (1) Each newly hired CSHO shall complete a one year developmental program which shall include a plan to meet the formal training, OJT and self-study requirements outlined in this P&P.

NOTE: The Developmental Program period for a newly hired CSHO who comes to the Division with an extensive previous experience in the specific job duties he or she will perform in the Division may be shorter than one year based on the supervisor's assessment of the individual's background and progress.

(2) Initial Courses

The following basic courses shall be completed within the first year of the Developmental Training Program:

(a) DOSH Policy & Procedures Manual (P&P) Self-Study;

Each newly hired CSHO shall be required by their supervisor to complete a self-study of the Division's P&P prior to attending the Initial Orientation Course.

(b) Initial Orientation Course;

Each newly hired CSHO shall be required by their supervisor to attend the Initial Orientation Training Course. Attendance is permitted only after having completed the DOSH Orientation Manual Self-Study and DOSH Policy & Procedures Manual (P&P) Self-Study programs. The purpose of the Initial Orientation Course is to provide new CSHO's with a working knowledge of Division policies, procedures and administrative programs.

NOTE: The Initial Orientation Course may not be waived.

(c) Introduction to Safety Standards; or

After having completed the Initial Orientation Course, each newly hired CSHO shall be required by their supervisor to attend either the Introduction to Safety Standards, or the Introduction to Health Standards, during the Developmental Training Program period. The purpose of these two courses is to provide newly hired personnel with a thorough introduction to the content and organization of the standards contained in Title 8.

NOTE: This course may not be waived.

(d) Introduction to Industrial Hygiene Standards

See explanation in (d) above.

(e) Crossover Training

The Division recognizes the need for CSHO's to be familiar with the general concepts of both safety and health. Thus, each newly hired CSHO shall be required to complete crossover training in the area that is not their primary discipline. This is to be completed in their developmental period and must be immediately completed by newly promoted Senior Safety Engineers if not previously taken.

(f) Technical Courses

- i. Each newly hired CSHO's is required to attend at least two courses specific to their professional discipline during the Developmental Training process.
- ii. These courses shall be selected from the following basic core courses or their equivalent:

1. Safety

- Hazardous Materials
- Electrical Safety
- Machine Guarding
- Fire Protection
- Cranes and Rigging
- Excavation, Trenching and Soil Mechanics
- Principles of Scaffolding
- Construction Safety
- Logging Safety

- Heat Illness
- Agricultural Safety and Health
- Permit-Required Confined Spaces
- Concrete Forms and Shoring
- Fall Arrest Systems
- Steel Erection
- Applied Welding Principles
- Emergency Response
- Process Safety Management
- Demolition
- Combustible Dust
- Certified Safety Professional Exam Preparation

2. Health

- Accident Investigation
- Industrial Noise
- Principles of Industrial Ventilation
- Respiratory Protection
- Industrial Toxicology
- Principles of Ergonomics
- Indoor Air Quality
- Bloodborne Pathogens
- Analytical Methods
- Heat Illness
- Agricultural Safety and Health
- Aerosol Transmissible Disease
- Permit-Required Confined Spaces
- Applied Spray Finishing and Coating Principals
- Applied Welding Principles
- IH Sampling
- Emergency Response
- Certified Industrial Hygienist Exam Preparation

iii. Upon completion of the Developmental Program, the safety engineer or health specialists shall demonstrate:

1. A working knowledge of the fundamentals of hazard recognition, evaluation, and control; courses shall be selected from the following basic core courses or their control;
 2. An adequate knowledge of the implementation of engineering controls, abatement strategies, and the generation and interpretation of quantitative data;
 3. A reasonable comprehension of basic industrial processes and the ability to take quantitative observations and measurements;
 4. The ability to properly calibrate and use measuring instruments;
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5. The ability to perform solo inspections or participate as a member in team inspections in most types of industries;
6. Knowledge of California workplace safety and health laws and regulations;
7. The ability to present inspection data efficiently in an administrative legal proceeding; and
8. The ability to make an appropriate referral to other safety engineers and/or health specialist.

iv. Waiver Conditions

1. If a newly hired safety engineer or health specialist has substantial prior safety or health experience and the required Developmental Training Program does not meet the individual's needs, the supervisor and the employee shall design an alternative Developmental Training Program in conjunction with the IDP process.
2. Any alternative IDP training plan developed for an individual safety engineer or health specialist shall be approved by the Regional Manager after consultation with the District Manager and PDT Unit lead.
3. Waiver requests shall be submitted in writing by the District Manager to the Regional Manager and shall take into consideration how the safety engineer or health specialist has acquired the levels of knowledge, skills, and abilities to perform his or her duties. The Regional Manager's response to the waiver request shall also be in writing.

NOTE: When a revised formal training plan is developed and approved, additional requests for waivers from specific mandatory courses are not required.

v. Monitoring

1. The supervisor's monitoring of the newly hired safety engineer or health specialist's progress through the Developmental Training Program period is critical to the success of the individual's training program and future with the Division. Monitoring provides information on whether the safety engineer or health specialist is achieving the curricular goals of the Developmental Training Program.
2. The employee's supervisor shall ensure that each CSHO has completed the necessary course prerequisites before attending any mandatory DOSH training course.
3. The employee's supervisor shall review each CSHO's performance of required self-study assignments.

NOTE: Review provides the supervisor with information on the progress of the safety engineer or health specialist and can assist in identifying areas requiring further training.

4. The employee's supervisor shall design and review an OJT training plan for each newly hired CSHO. See Section H.

I. ON-THE-JOB TRAINING AND SELF-STUDY ASSIGNMENTS

1. OJT Purpose

OJT training is designed to apply the principles and theories learned in the classroom to field situations.

2. OJT Assignments

- a. The Division requires that newly hired CSHOs conduct inspections in a variety of industrial settings, including manufacturing, agriculture, construction and office environments and that a proportion of these inspections be conducted accompanied by an experienced safety engineer or health specialist.
- b. OJT assignments shall be provided by Division supervisors to emphasize and complement the material covered in formal training courses.
- c. The time allotted to accomplish OJT assignments should be compatible with the current knowledge, skill, and experience level of newly hired CSHOs.

3. Supervisory Oversight

The expertise and judgment of the employee's supervisor is required when assessing the employee's progress during OJT training.

4. OJT Goals

OJT training in the following subject areas, at a minimum, is to be accomplished through both OJT assignments and self-study:

- a. Hazard recognition overview;
- b. Inspection procedures;
- c. Title 8 Safety Orders for General Industry, Construction and Other Safety Orders;
- d. Division Policy and Procedure Manual;
- e. IH Technical Manual;
- f. Common industrial processes;
- g. Basic elements of an effective Injury and Illness Prevention Program;
- h. Sampling Instrumentation;

- i. Violation documentation, violation classification, citation preparation and report writing;
 - j. Standards from other sources, such as American National Standards Institute; National Electrical Code; National Fire Protection Association; American Conference of Governmental Industrial Hygienists; Industrial Agency for Research on Cancer; and National Toxicology Program.
5. OJT Monitoring
- a. OJT Training shall be completed within the Developmental Training Program period. Although expertise in areas such as hazard recognition and industrial processes requires long-term, continuing education, it is expected that a solid foundation of information related to these topics will be presented during this time.
 - b. When the employee's supervisor determines that the newly hired safety engineer or health specialist has gained sufficient experience to participate fully in developing the actual case file, the OJT review may be discontinued.
6. Self-Study Assignments

Instructional methods such as the use of audiovisual aids, reading materials, case file review, staff meetings, and inspection activity may be used by the employee's supervisor to assign the required topics. For a list of resources materials helpful for self- study, supervisors shall contact the PDT Unit.

J. EVALUATION

1. An evaluation of the effectiveness of the Division Professional Development and Training Program shall be conducted at the end of the second calendar year from the effective date of this P&P.
2. During the evaluation, PDT Unit staff shall interview District Managers and CSHO's who have participated in the Program to determine whether the Professional Development and Training Program provide a feasible and effective technical training plan for compliance personnel. PDT Staff shall also obtain suggestions for program improvement.

K. TRAINING REQUESTS

1. In-Service Training Requests
 - a. All in-service training programs shall be coordinated by the PDT Unit. Registration for attendance at in-service training classes shall be performed through a written memorandum from the District Manager to the PDT Unit staff. It is the responsibility of each participant to assure his or her own registration through their supervisor.
 - b. Attendance at all in-service training classes shall be restricted to participants who have pre-registered with the PDT Unit. No exceptions will be made.
 - c. In cases where there are multiple locations scheduled for a training, participants are expected to

attend the training session scheduled nearest their assigned office. Participants from the "home" Region will be given priority for registration and attendance. Participants from other Regions will be accepted, as space permits, with a supervisor's note of explanation and headquarters approval.

- d. Supervisors are to notify the course chairperson and the PDT lead of any circumstance causing a late arrival at, or an early departure from, any training course for which they have a registered student. In addition, it is the responsibility of the participant to obtain permission from his or her supervisor of any change in attendance schedule. If a student cannot attend class because of illness or some other emergency, they must contact their supervisor and the lead instructor to report their situation.
- e. Training participants in training classes are expected to adhere to all State personnel rules and the following Division rules:
 - (1) Reading of newspapers or other non-training related materials, use of laptop computers (except as expressly pre-arranged), using cell phones or participating in some other disruptive behavior during class is not acceptable;
 - (2) Participants should also monitor "overuse" of class time by engaging in excessive commentary or repeated questioning and reserve such commentary or questioning for after-class discussion with instructors.
- f. Division managers attending training classes are expected to monitor and assure appropriate decorum in the classroom by all participants.

2. Out-Service Training Requests

- a. Individuals requesting out-service training shall complete a Request for Out-Service Training (DIR AT-202:Pink) Form whether there is a fee for such training or not. This request shall be approved by the requestor's supervisor and forwarded to the PDT Unit. Attach a Form A6-120B, Request for Funds (Green), if appropriate. A description of the requested training must be attached to both forms. See the instructions on reverse of Request for Out-Service Training Form.
- b. Reimbursement for out-of-pocket training costs will be made after the employee has attended the training and submits a Travel Expense Claim through CalATERS. Attach a copy of canceled checks and/or receipts to the CalATERS transmittal page. Reimbursement for out-service training shall be paid in accordance with any current collective bargaining unit agreements or Memoranda of Understanding (MOUs).
- c. Supervisory personnel are reimbursed in accordance with the Departmental Policy and Procedure and current prevailing rates as promulgated.

3. Out-of-State Training Requests

- a. Managers and supervisors must submit requests for out-of-state training to the PDT Unit at least 6 months before the start of the fiscal year in which the training will occur because costs must be approved as part of the overall Division budget.
- b. Request for approval of Out-of-State Travel Form STD 257 and the Request for Out-Service

Training Form DIR AT-202 must be processed whenever out-of-state travel for training or conference attendance is requested.

Attachments:

A - [DOSH Recommended CSHO Training Activities – Year One](#)

B – Recommended CSHO Training for Years Two and Three (To Be Developed)