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POCL   POCL Policy For Releasing Individuals   Ref: BP/PRD/007
                             To Attend Training   Version: 1.0
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Document Title: POCL Policy For Releasing Individuals To Attend Training - CAR 532.000.003

Document Type: Contractual

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Distribution: **POCL**   **ICL Pathway**

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0. Document Control

0.1 Document History

Version	Date	Reason
0.1	09/09/97	First draft version
0.2	15/11/97	Second version following comments from ICL Pathway
0.3	31/12/97	Third version following review by POCL
0.4	9/06/98	Fagin review by ICL and POCL
1.0	02/08/98	Final Version

0.2 Approval Authority

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0.3   Associated Documents

Reference:	Version:	Date:	Title:
BP/TRN/001	2.2	26.3.98	Training & User Awareness Baseline Document
SU/TRN/001	0.1	09.3.97	Training Needs Analysis
BP/PRD/013	0.1	21.5.98	POCLs Processes for Training Scheduling and Awareness to Support National Roll Out.
IM/REQ/014	1.0	27/05/98	Training Scheduling and Minimum Training Compliance.
SU/REP/021	1.0	31/10/97	Standard Reports and Format
IM/CLOS/001	1.0	21/05/98	Closure Policy for Outlets
IM/SST/001	1.0	21/05/98	POCL Steady State Training Policy

0.4   Abbreviations

CAR	Contractual Authorities Responsibility
HFSO	Horizon Field Support Officer
MIB	Management Infrastructure Briefing
MTC	Minimum Training Compliance
NFSP	National Federation of Subpostmasters
NT & DT	National Training & Development Team
POCL	Post Office Counters Ltd
RLM	Regional Liaison Manage
RNM	Retail Network Manager
TAC	Training Administration Centre
UAE	User Awareness Event

0.5   Changes In This Version

Result of a joint POCL/ICL Pathway Fagin review.

.0.6 Table of Contents

1. Introduction

The purpose of this document is to identify POCL's policies covering Contractual Authorities Responsibility (CAR) 532.000.003.

It demonstrates at high level how we will ensure staff are released for all necessary training events. The detail of how this will happen is covered in other documents referred to at 0.3 Associated Document.

2.   Scope

The scope of this document is limited to describing the deliverables at a high level associated with the release of individuals to attend training and covers the following areas:-

- the process adopted by POCL to release the appropriate individuals for training.

- the process for escalation within POCL when individuals fail to attend training within the five day window

- the process in which POCL will pro-actively inform and encourage users to attend and training events. It will also explain their contractual obligations to attend training.

- contingency procedures within regions

- the process of how regions are informed of this contractual CAR and how RLM's are notifying RNMs and regional staff of it's significance to the success of the rollout.

3.   Duration Of Specific Courses

Horizon training courses have been developed to meet the varying needs of the 72,000 people identified as requiring some form of Horizon Training.

Each specific course has been developed by ICL Pathway with input from the relevant areas of expertise within POCL. A Training Needs Analysis document has been baselined and in this document all the various course are specified module by module. The document also details the respective number of people who will attend the different types of courses and over what period of time, below is an outline of the type of course each job role will undertake and the duration of the course :-

- branch managers, agents, reliefs or their substitutes will be given 1.5 days course

- counter clerks and subpostmaster's assistants will be given a 1 day/7 hour course
- RNMs/RLM's will be given the same course as a branch manager
- audit, investigation and security will receive a 2 day course with differing contents
- helpline staff will receive a 1 day course delivered by ICL Pathway with any additional requirements delivered by POCL trainers as defined.
- POCL trainers will receive a 5 day course after which at the end they will be accredited to continue training on the Horizon system.
- HFSO will be given a 5 day training course and the 1.5 day managers course
- any other attendees will be given the 1 day course (as identified in SU/TRN/001)

4. POCL Approach To Releasing Individuals To Attend Training

POCL will ensure all staff, agents, registered assistants and reliefs are released for training for release 2 and 2+. The release of staff will comply to POCL requirement 915 where all staff will be made available for training . see BP/PRD/013 and IM/CLOS/001 for more detail. An outline of some of the processes in place to support attendance at training and awareness events are shown below :-

- POCL via the RNM or RLM will contact either by phone or in person any individual refusing to attend training.
- POCL where necessary will allow for an outlet to close to attend training.
- POCL will make a one off payment to a Subpostmaster for their attendance at training (including awareness events)
- POCL will deem any Subpostmaster refusing to attend training, to have failed to meet their contractual obligations and therefore they are unable to run a Post Office
- Subpostmasters will be asked to sign a statement, explaining the consequences of their refusal to attend training.
- Subpostmasters have been made aware that it is their responsibility to release all their staff to attend training and that should any fail to do so they will not be allowed to use the Horizon system until they have had local training given by the Subpostmaster.

All individuals (except POCL trainers and specialists) will receive their training call up papers one month in advance of their proposed training date. POCL require a 20 week lead in time for trainers and specialists as their work is scheduled this far in advance, training invites will be sent out at week 16.

4.1   Process

There will be a formal request to attend training from ICL Pathway which is the beginning of the training process. (see IMP/REQ/014). The identification of those individuals who require training will be obtained via the training requirement questionnaire completed at the time of the UAE by the manager or agent.

Training will be offered within a 5 day window prior to installation. Call up notices allocate a date, if this is not acceptable then an alternative date will be offered within the five day window prior to installation.

Arrangements to ensure individuals attend within this 5 day window will be the responsibility of the line manager or agent. Any issues which need resolving will be escalated via their line managers (BP/PRD/013 refers).

HFSO, POCL trainers, auditors, security, investigation and other specialist staff training requirements will vary in length and the release of these individuals will be agreed with the respective Heads of Sections. (BP/PRD/013 refers).

4.2   Refusal To Attend

ICL Pathway will notify the respective RLM of any individuals who refuses to attend training via electronic mail within 24 hours. The RLM will notify the RNM by phone or electronic mail within 24 hours. The RNM will visit the outlet to explain the position, further refusal will be escalated to the Head Of Retail Network to make the decision on the way forward. (BP/PRD/013 refers) POCL have produced general guidelines to be communicated to the regions on how to deal with individuals refusing to attend and timescales to react to problems.

4.3   Non Attendance On Day Of Training

The trainer will phone ICL Pathway who will let the respective RLM know via email on exception report the details of the individual who has not turned up cross reference SU/REP/021 . The RLM will let their RNM know, and they will ascertain the reasons. It is the responsibility of the subpostmaster to arrange an alternative training date via ICL Pathway.

4.4 Late Attendance The Day Of Training

The course which have been developed run on a modular basis working to a very tight timescales allowing very little time to be able to go over ground again.

To ensure an individual is given a fair chance to pass the competency test it has been agreed that anyone turning up more than 30 minutes late will be issued anew course.

The allocation of the late attendees place for that day will still count against the 72,000 training places over 12600 course.

4.5 Role of RLM/RNM To Gain Commitment To Attend Training

The Horizon programme is one of POCL's top objective and will form part of the RLM's/RNM's objectives. Different approaches will be made to ensure individuals attend ;

- Telephone call to offices encouraging attendance
- Visits to Offices
Regional issue of a communication pack

  Processes will be adopted to optimise the number of individuals attending the MIB and UAE events. RNMs will contact known individuals who refuse to attend training (BP/PRD/013 refers).

5.   Communications

POCL will provide regions with a policy document covering mandatory attendance at training (BP/PRD/013 refers). A separate communications paper has been produced outlining POCL policy for regions to distribute to all outlets. Below is an outline of some of the key communication activities planned :-

- Letter to Branch Secretaries explaining commitment required of its membership.
- Letter to all outlets re enforcing Branch Secretaries message
- Communication pack for each outlet explaining their role in the Infrastructure and Implementation Cycles.

6.   Turnover Training In Steady State

IM/SST/001 details the procedures in place to deliver steady state training.

6.1   Background

The method of training and delivery is detailed in section 3. The table below identifies the mechanisms that trigger the need for training:-

Turnover Training Required At:	Is Identified At:	Identified By:
Change of outlet or agent	appointment - request for training	Agency Recruitment
Opening new outlet	appointment	RNM/Agency Recruitment
Re-opening after suspension	suspension	RNM/Agency Recruitment
BO conversion	appointment - request for training	Network Transformation
Agency staff appointment	POID check	Agency Recruitment
FPO/IFPO staff appointment	POID check	Agency Recruitment
POCL staff promotion	appointment	Personnel
POCL staff transfer	transfer	Personnel
POCL staff recruitment	appointment	Personnel

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6.2 Method

When the need for training is identified, the appropriate POCL trainer will access the regional database to ascertain if the office is Horizon installed. The appropriate training will then be planned.

6.3   Training For Subpostmasters

The following sections contain overviews of the actions to be taken under each heading . Full details can be found in BP/PRD/013 and IM/SST/002.

6.3.1   Subpostmaster Resigns

Under normal circumstances POCL will be given 3 months notice that a subpostmaster wishes to resign. There will be exceptions to this, but the process as currently in place for manual office resignations, is flexible enough to deal with all eventualities, and will continue for the 1c release.

Upon receipt of notification of resignation the training section in the region will book an accredited Horizon trainer to attend the outlet at the day of transfer which is normally a Wednesday.

Following notification of a resignation, it is the responsibility of the trainer to ensure all the necessary documentation, training materials etc. are in place ready for the subsequent transfer and training to the incoming subpostmaster. An overview of the process is shown below :-

- Subpostmaster sends in a letter of resignation to the Regions Agency Recruitment Section
- The Vacancy is advertised
- Business Plans are submitted to Finance from Applicants
- Interviews are arranged for short listed applicants
- Appointment is made by RNM
- Agency Recruitment confirm takeover date with Training Department .
- Trainer is allocated and puts together a transfer pack.
- Pre Induction training is given two days prior to office transfer in classroom environment
- Office transfer takes place (Normally PM Wednesday)
- Trainer commences 2 week on site training
- Up to 3 supported balances are given by POCL trainer

6.3.2   Delivery Of Training

All of the training for new subpostmaster's will be given by POCL trainers who have undergone the 3 day ICL Pathway training course.

Delivery of training will be by POCL trainers, on-site, and in between customers. Where new assistants join at the same time as the new subpostmaster, they will also be given on site training by POCL trainers.

Training on site will start after the Subpostmaster has undertaken their two day induction course. The induction course is used to enable the Subpostmaster to have some insight into how the counter operates.

The induction course will use the Horizon platform and the 1.5 day managers course used during roll outwill form the nucleus of the two days Training. The top ten transactions of the outlet due to be transferred will also be demonstrated to the incoming subpostmaster using Horizon. The course also covers POCL Customer first principles, Customer Care training and POCL user guides.

The office is transferred on the Wednesday PM supported by the Auditors and trainers. The live training starts the day after transfer.

6.3.3 Commencement of on site training

The trainer will sit behind the Subpostmaster observing how they are processing each transaction and assisting where necessary . At quiet times they will ,encourage the Subpostmaster to switch to training mode to consolidate what they have learned in the induction course and to process transactions they have yet to come across, using the training material provided by ICL Pathway.

In all, training on site fully supported by an accredited trainer will last for two weeks, plus support for up to 3 balances, or more if required. All on site customer facing transactions are conducted using the Horizon system therefore giving them not only the 1.5 day Horizon course given to Subpostmasters during roll out but a further supported two weeks of training.

6.3.4   Appointment Of New Subpostmaster's Assistant

POCL policy is that the subpostmaster will train new assistants on site, and they will be supported by POCL training material, currently being developed. This process will be fully described in "steady state" policy document. The Subpostmaster will also have to sign a certificate stating that they have trained any new staff to an acceptable standard using the Horizon System Training Mode Function.

6.3.5   Relief Subpostmasters/Holiday Substitutes

The training of relief subpostmasters or holiday substitutes will be the responsibility of the subpostmaster up to the start of release 2 live trial. It is their responsibility to ensure Reliefs or Substitutes are trained to a standard where they can competently use the Horizon platform .

ICL Pathway have trained known reliefs as part of the 1c training programme up to the end of October 1997.

6.3.6 New RNMs or Specialists

Turnover training for the above will be carried out by POCL trainers where possible using the Horizon equipment installed in each of the pilot regions. The scheduling and timing of the training will be agreed between the individual and the training department.
This will be delivered by POCL trained trainers on site or in a classroom as currently performed, at the discretion of the local T&D Manager. Additional training material is currently being drafted to support the trainer. This will be submitted to ICL Pathway on its completion by NT&DT (end of August 1998).

6.3.7   Trainer Training

RLM's will identify regional training staff requiring their courses 20 weeks ahead of the course date. Six staff will be allocated to each course. The RLM will supply the names and courses required to ICL Pathway in week 19. They will invited at week 16 to the respective courses and inform the T&D manager of the course details. The T&D manager will be responsible for ensuring their staff are released (BP/PRD/013 refers).

7.   Documentation For Steady State Training

POCL have taken a decision to use their own training material for all future releases. ICL Pathway currently own the copyright for all training material

This decision was based on the need to have an Horizon document which is completely fit for our training purpose in steady state. It was felt that the current material used by ICL did not meet our requirements . Cost was also a factor in our decision the price quoted by ICL for replacement work books was excessive and that we could produce our own workbooks at significantly reduced costs.

POCLs policy for the use of these work books will be that they will be consistently deployed across our current seven regions and no deviation from the scripted text will be allowed. It is the responsibility of each training manager to ensure correct and consistent deployment.

A current rewrite of the Horizon training work books is being undertaken by NT & DT and when produced should be used for both 1c and release 2 turnover training.

It will still be ICL Pathway's responsibility to update POCL's accredited trainers via NT&DT who in turn will update their own training materials.

8. Future Release

After Release 2+ or for new product training the price for ICL Pathway to deliver training will be subject to separate negotiations and part of the Business Requirements Definintions.

9.   Reporting

The detailed process for reporting has been outlined in ICL Pathway's document SU/REP/021 Standard Reports And Formats for release of staff during roll out.

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