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FAX header

To Kathryn Cook
From Alan Bourne

Fax number

GRO

Pages to follow

several! (18)

Date

30/3/99

Kathryn,
a copy of the report from Kevin Fletcher
at Leitas follows.

Cheers

GRO "ALAN"

Alan Bourne
Business Psychologist

Telephone GRO
Facsimile GRO



Business Services Consultancy
Post Office Counters Ltd.

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now all passed

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P.001

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ATHWAY 82 ID:01817304148

POCL RESEARCH 30 MAR 99 12:55 NO.004 P.002

Horizon system Training

"The First 14"

Report on practice events

ICL TRAINING SERVICES

30/03 '99 17:48 FAX GRO
PATHWAY B2 ID:01817304148

POCL RESEARCH SU MHK '99 15:00 NO.004 P.03
Report on practice events

Report on NR2 training practice events

Author: Kevin Fletcher (ICL Training Services)

Date: 28/03/99

Description: A report for Steve Lovegrove (Pathway) which is an assimilation of the results and comments from all 14 practice courses both Counter manager and Counter assistants to date which were commissioned by POCL for Feb/Mar 99

Distribution: Steve Lovegrove (Pathway)
Andy Barkham (Pathway)
Stuart Kearns (ICL Training Services)
Moiria Pertrie (ICL Training Services)
Dave Scott (ICL Training Services)

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Report on practice events

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Report on practice events

1. Introduction:

ICL Training Services were requested by Pathway/POCL to provide trainers for a series of courses for Counter Assistants and Counter Managers on the Horizon system. The delegates on the courses were volunteers from POCL. The aims of these practice courses from an ICL Training Service perspective were as follows:

1. To give experience to new trainers who had completed the ICL Training Services induction course in November/December 1998 and a recent Horizon update week-end in delivering the Counter Assistant and Counter Managers events.
2. To receive feed back from the delegates on the course content.
3. To evaluate the Performance Standard Assessment (PSA) results.
4. To evaluate the equipment reliability when used in a training environment.

Pathway/POCL had agreed to use the courses as an opportunity for new trainers to train in a real environment.

2. Outline:

The courses were delivered in a variety of locations within UK. The trainers were all delivering the courses for the first time initially (with one exception) and were working in pairs to maximise benefit. The trainers who delivered the first courses were used again on subsequent courses as a second trainer this allowed a mix of a trainer who had delivered one course and a trainer who was delivering for a first time. The HFSO development had an impact on the original plan for the allocation of trainers, as several of the trainers who were involved in the HFSO courses were withdrawn from this training.

Date	Location course.	Trainer/s	Type of Course
22/23 Feb	Bristol	Stanyer	Counter Managers
24 Feb	Bristol	Thompson/Smith	Counter Assistants
25/26 Feb	Bristol	Thompson/Smith	Counter Managers
25 Feb	Bristol	Bardon/McKay	Counter Assistants
4/5 Mar	Glasgow	Dick/Wayman	Counter Managers
5 Mar	Glasgow	Stanyer/Mitchell	Counter Assistants
8/9 Mar	Newcastle	Wayman/Pape	Counter Managers
10 Mar	Newcastle	Bisset/Pape	Counter Assistants
8/9 Mar	Birmingham	Stanyer/Storey	Counter Managers
10 Mar	Birmingham	Stanyer/Storey	Counter Assistants
15/16 Mar	St. Albans	Stanyer/Mitchell	Counter Managers
17 Mar	St. Albans	Stanyer/Bisset	Counter Assistants
15/16 Mar	Tunbridge wells	Thompson/McKay	Counter Managers
17 Mar	Tunbridge wells	Thompson/McKay	Counter Assistants

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Report on practice events

3. Purpose of Report:

The purpose of this report is to provide an analysis of the feedback from all 14 courses conducted during the trial.

The report provides a summary of course appraisals that have been received. It raises issues from both a trainer and delegate perspective.

4. Systems:

Roy Thomason (ICL Training Services) is monitoring the swap out rate of systems used for training and this will be the subject of another report.

5. Appraisals General:

The appraisal layout for both courses is the same.

1. There are 4 grades of box for 5 elements of the event:

Achievement of course objectives
Quality of course presentation
Skill and knowledge of the trainer
Quality of course materials
You're overall level of satisfaction

2. The totals for each grade for all courses totalled from the appraisals by category is as follows:

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	1	19	41	17
Quality of course presentation	0	9	33	37
Skill and knowledge of the trainer	0	11	28	40
Quality of course materials	1	15	38	24
Your overall level of satisfaction	7	12	39	19
TOTALS	9	66	179	137

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179
66
137

282

282
282
97.8%

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Report on practice events

3. By Course:**22/23 Feb Bristol Counter Managers**

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	3	2	1
Quality of course presentation	0	0	5	1
Skill and knowledge of the trainer	0	0	3	3
Quality of course materials	1	1	3	1
Your overall level of satisfaction	1	2	3	1
TOTALS	2	6	16	7

Remarks general:

More time required (several comments).

Venue would have been better if on outskirts of Bristol.

Small room (couple of comments).

No car parking.

Too much information compressed into course.

You should have a 5 Box (this delegate marked all boxes as excellent).

Although trainer was excellent not enough time to cover all topics plus questions.

Good trainer not enough time allowed.

24 Feb Bristol Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	0	4	1
Quality of course presentation	0	0	1	4
Skill and knowledge of the trainer	0	0	1	4
Quality of course materials	0	0	2	2
Your overall level of satisfaction	0	0	2	2
TOTALS	0	0	10	13

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Report on practice events

Remarks general:

A lot of information to take in one day no doubt practice is best way to learn.

A good training session, enjoyable, helpful and informative.

Nice to be away from the normal PO environment for training able to concentrate on one thing.

Need more practice but understand the basics.

I have a much greater understanding of Horizon following this course.

25/26 Feb Bristol Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	1	1	2
Quality of course presentation	0	0	1	3
Skill and knowledge of the trainer	0	0	1	3
Quality of course materials	0	0	2	2
Your overall level of satisfaction	1	0	1	2
TOTALS	1	1	6	12

Remarks general:

Not confident not computer literate.

I will need extra training.

More time on balancing – error notices.

Reasonably confident.

The instructors were very helpful and enthusiastic and always answered your questions before proceeding.

Fairly confident.

Second day should be expanded to full day-especially for delegates who have no experience of automated systems.

Course well delivered good idea to use two trainers.

Very enjoyable always afforded opportunity to ask questions.

Where do reports go?

More time needed, setting up users-allocating users.

Course definitely requires two full days second day is six hours with no lunch break, I feel the course is unsatisfactory because it is very intensive and coverage of important tasks i.e. balancing is rushed as a result. Bearing in mind a subpostmaster could be asked to do their first balance unsupervised.

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Report on practice events

25 Feb Bristol Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	0	2	3
Quality of course presentation	0	0	2	3
Skill and knowledge of the trainer	0	0	0	5
Quality of course materials	0	0	1	4
Your overall level of satisfaction	0	0	3	2
TOTALS	0	0	8	17

Remarks general:

Fairly confident

Very good and very useful.

It was a good event and I enjoyed it.

Not yet totally confident-1 day is not enough.

Much better than on site training.

Quite confident obviously practice makes perfect.

Very pleasant surroundings good hospitality.

It would be useful for staff to try more transactions-products not covered.

5 Mar Glasgow Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	3	3	0
Quality of course presentation	0	2	1	3
Skill and knowledge of the trainer	0	2	1	3
Quality of course materials	0	3	2	1
Your overall level of satisfaction	2	1	2	1
TOTALS	2	11	9	8

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Remarks general:

More time needed on Reports.
Confident to serve basic customer requests.
Not confident on end of day procedures practice will help.
A sound basis on Horizon feel at an advantage having done ECCO+Procedures feel it would have been more beneficial to have learnt about balancing.
More time needed on training (Two pers).
Not confident at all.
Fairly confident. (Two pers)
I am fully committed to Horizon and found this an excellent day; this is the only way forward.
Quite confident previous ECCO experience, without this experience I would be less confident.
Reasonably comfortable with all the kit and stationary needed.
Workbook not used.
Too long spent on hardware.
Not very confident.
Do not have enough information to balance my position at the end of my shift.
Too much information was crammed into too short a time, the course was too long time wise.

4/5 Mar Glasgow Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	1	5	0
Quality of course presentation	0	0	4	2
Skill and knowledge of the trainer	0	2	2	2
Quality of course materials	0	2	3	1
Your overall level of satisfaction	0	2	4	0
TOTALS	0	7	18	5

Remarks general:

Set-up of equipment was to the left and I am right handed found uncomfortable.
These comments have to be taken in context based on the fact that this was very much a trial.
Good practice or best practice re SU control (like to add).
Reporting back on questions caused over-run if module time includes questions then insufficient time allocated.
Pace and style of presenters good and relaxed.
Rushed at the end overall very good.

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Balance ran out of time more time required.
More time daily summaries/Balance.
Fairly comfortable.
I did not understand when and why they were being carried out.
Unable to understand some of the topics to the end level.
Very confident.
Fairly confident.
All icons were not covered.
Reasonably confident
Role-play should have been constructed e.g. examples of icons used etc.
Good insight into Horizon system.

8/9 Mar Newcastle Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	3	1	1
Quality of course presentation	0	4	1	1
Skill and knowledge of the trainer	0	3	2	1
Quality of course materials	0	2	3	1
Your overall level of satisfaction	0	3	0	1
TOTALS	0	15	7	5

Remarks general:

Practice will make perfect
More on transactions and how to balance.
How to put things right (more time).
Confident of the basics, need practice (Two pers).
Would have felt more comfortable working with my peers in the organisation.
More on balancing outputs / actual printouts.
Time has to be built in to play with the system.
Only time will tell.
What should be kept, what discarded (reports).
Less time on user allocation.
Balance / cash account procedure (more time).
Reasonably confident.
8.30 start - early finish preferable.
Sufficiently confident.

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8/9 Mar Birmingham Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	0	4	1
Quality of course presentation	0	0	0	5
Skill and knowledge of the trainer	0	0	0	5
Quality of course materials	0	0	2	3
Your overall level of satisfaction	0	1	3	1
TOTALS	0	1	9	15

Remarks general:

Stock units – transfer / setting up / balancing (more time).

Concerned I feel if you you're not careful in the accounting aspects of Horizon you might find yourself in trouble. You need to know what you doing.

More time needed on the balancing procedure. Sped through a lot of information and the course quite intense.

Balancing (more time).

Pretty confident with day to day work & procedures, still confused over the balance in relation to comparing it with what I do at present.

Still a little unsure in using system.

Found going through from Icon to Icon a little daunting but I think with more hands on I will become more confident.

Very interesting, quite intense, but very enjoyable have learnt a lot.

A little longer needed on balancing procedures.

Reasonably confident, I am sure once using equipment for real everything would quickly become automatic.

A very good overview of the system and its functions.

Balancing section is a lot to take in within the current format.

Confident in day 1 content, less confident on the management / balancing section.

As someone without counter knowledge I have been pleased at how easy the system is to use.

The knowledge of the trainer was very good and his experience of post office life was a real plus.

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Report on practice events

1. Introduction:

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10 Mar	Birmingham	Stanyer/Storey	Counter Assistants
15/16 Mar	St. Albans	Stanyer/Mitchell	Counter Managers
17 Mar	St. Albans	Stanyer/Bisset	Counter Assistants
15/16 Mar	Tunbridge wells	Thompson/McKay	Counter Managers
17 Mar	Tunbridge wells	Thompson/McKay	Counter Assistants

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10 Mar Newcastle Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	0	3	2
Quality of course presentation	0	0	5	0
Skill and knowledge of the trainer	0	0	5	0
Quality of course materials	0	0	5	0
Your overall level of satisfaction	0	0	4	1
TOTALS	0	0	22	3

Remarks general:

More about problems that can / do occur.

More on Benefits Agency and daily reports.

Confident.

Reversal of incorrectly entered transactions (Two pers).

Fairly confident, more practice needed to become fully familiar with the system.

Out of hours training is much easier, there isn't the distractions and you can get on with what ever you are learning.

I feel confident but as with all new systems on the job experience is the best learning method.

Finding you way around the menus is a bit confusing at times but with time and practice this will soon become second nature.

The first session could have been condensed.

Very confident, given practice and access to manuals.

10 Mar Birmingham Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	1	1	4	0
Quality of course presentation	0	1	4	1
Skill and knowledge of the trainer	0	1	4	1
Quality of course materials	0	1	4	1
Your overall level of satisfaction	2	0	4	0
TOTALS	3	4	20	3

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Remarks general:

I need at least 2-3 times more of this training before I can feel confident.
I need to be trained again for the course, as I cannot remember everything that was taught.
In general it felt a bit rushed.
Fairly confident, more practice would be beneficial.
I did feel that the content of the course was a bit rushed, it may be better held over two days.
I feel very confident with using the system as a whole.
I feel I could search through if need be.
Quite confident.
Balancing / stock control needed.
Hmmmml (confidence level)
Really needs two days.

15/16 Mar St Albans Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	1	4	2
Quality of course presentation	0	0	0	7
Skill and knowledge of the trainer	0	0	1	6
Quality of course materials	0	1	4	2
Your overall level of satisfaction	0	0	4	3
TOTALS	0	2	13	20

NB: One delegate was ICL observer (Kate Sommerville).

Remarks general:

All topics were covered.
Balancing needed more time.
Confident enough but still need assistance in transactions.
Use of office printer and demonstrate reports it can do (like to add).
More time needed for allocation, users, stock units and passwords.
Good to be away from normal working environment.
Having experience of using FCCO and understanding balance periods and CAP helped. Although I feel that ½ day for balancing could be insufficient for offices that do not have this experience.
Confident.
Everyday transactions need making a little more obvious, at the moment they are rolled into one transaction which becomes a little overwhelming.
I could happily use it tomorrow.

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The course could be spread over two days with less hours in the first as after 4pm we started to wane and it took longer to digest the information.
I wanted to take away a workbook of some sort to use.
As a non-computer user I am awaiting roll out with confidence.
Fairly confident.
A lot to take in, with the help of training books and in own time I feel I'll be more confident.
More time on balancing, more on PUNS.
60% confident.
Some of first day rolled over to second day, making first day a little shorter.
I found the ambience conducive to learning and really enjoyed the experience.
Am pleased that I will be having a second bite at the course.

15/16 Mar Tunbridge Wells Counter Managers

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	2	3	1
Quality of course presentation	0	1	4	1
Skill and knowledge of the trainer	0	1	4	1
Quality of course materials	0	3	2	1
Your overall level of satisfaction	1	0	4	1
TOTALS	1	7	17	5

Remarks general:

MVL – National Lottery & Parcel Force (like to add).

Confident (Three pers).

Branch and sub-offices should have separate training schemes.

Office copies / actual final cash accounts (like to add).

Branch office / sub-offices obviously have different needs – should training for these offices be separated?

Very confident.

Well organised training session.

Very useful.

Cash account (like to add).

I would appreciate more focus upon the actual cash account and related summary forms required by Chesterfield.

No problems – especially with a training facility on system.

Enjoyed role play section -- it gives you the opportunity to really use the system on your own.

Would have been useful to see office printer in operation.

Very confident on Serve Customer but balancing remains an issue.

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17 Mar St Albans Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	1	2	3
Quality of course presentation	0	0	1	5
Skill and knowledge of the trainer	0	1	0	5
Quality of course materials	0	0	2	4
Your overall level of satisfaction	0	0	3	3
TOTALS	0	2	8	20

Remarks general:

Moderately confident.

Very confident.

Not very confident yet.

Reasonably confident as long as I take my time until I become more familiar.

One trainer Barry was excellent, the other Rob was satisfactory and I understand it was only his second time. He was very nervous but did a reasonable job and I'm sure he will be fine with more practice.

Quietly confident.

Confident.

17 Mar Tunbridge Wells Counter Assistants

	Unsatisfactory	Satisfactory	Good	Excellent
Achievement of course objectives	0	3	3	0
Quality of course presentation	0	1	4	1
Skill and knowledge of the trainer	0	1	4	1
Quality of course materials	0	2	3	1
Your overall level of satisfaction	0	3	2	1
TOTALS	0	10	16	4

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Report on practice events

Remarks general:

Balancing (Two pers) (like to add).
Reasonably confident.
Could always have more time.
The system itself is no problem but finding some particular transactions seems difficult.
The 'dummy' training aids do not always resemble the real thing.
Error adjustments (like to add).
Feel a bit mixed up with issuing PUNs / PANs etc.
The training is difficult to assess with the constant advances being made before going live. I'm sure this will be sorted out and in the main the course was very interesting.
Quite confident.
Fairly confident (Two pers).
Only satisfactory - because for my role as an auditor I needed to cover the balancing aspect of the system.
Stock and office balancing (like to add).
Trainer knew about Horizon but not enough of POCL transactions. No training given on stock balancing etc.

4. Visitors:

There were a number of visitors to events, although it had been previously agreed on a Pathway training meeting that no visitors would attend these events. As the events were the trainers first to "real delegates" the added pressure of in some cases very senior visitors to a trainer's first event made them somewhat apprehensive.

5. Course Delivery:

It is important that the course is delivered within the timings specified, timings are difficult for a new trainer to judge with accuracy as the delegate groups differ from event to event in their aptitude for this type of system. It will take most trainers a number of deliveries until they are confident and practised enough to make the best use of time. The event can, and has been, delivered in the time-scales set.

From a trainer perspective this is not an easy course for a first delivery, as the trainer has to be mobile throughout the event to fault check the delegates. This means that trainers have to remember 12 hours of information in the right sequence and maintain all the training techniques required of a professional trainer. To practice all the trainers in the delivery of one event prior to rollout would take approximately 1 man-year; trainers are assessed on elements of the courses as part of their induction. None of the information taught on the Horizon courses is in itself considered complicated. It is the volume of information delivered in the allocated time-scales, which causes the delegates concern.

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6. Unsatisfactory grading:

A small number of delegates graded elements of the event as "Unsatisfactory", the appraisals clearly stated on these occasions that the course delivery and trainer skills were not a contributory factor to this grade. The delegates felt that the amount of course content to be assimilated was more than they could cope with. They were concerned that they would not be able to operate the system effectively after installation.

7. Trainer grading:

The trainers achieved no unsatisfactory grading from any of the delegates. A significant number made additional favourable comments on the trainer's performance. Only one delegate commented on the trainer's lack of Post Office knowledge. While ICL Training Services are satisfied with the trainers first attempt at the events every effort will be made through the trainers Q&A process to raise the standard of trainer's performance even higher.

8. Streaming of delegates for courses:

It is the authors understanding that delegates were to be streamed for events this was not the case CA courses had delegates who were CM status and were disillusioned because the event did not include office balancing. Some courses also contained liaison staff for the project and one course two auditors. It is important that the course content is publicised for delegates to ensure the right delegate is on the right level of course.

9. Delegates requiring Additional Training

There were three delegates from all the courses who would have been required to attend an Additional Training event after completion of the Performance Standard Assessment. 79 delegates attempted the PSA 3 required Additional Training this equates to 2.37% of the total.

10. Performance Standard Assessment (PSA)

The PSA is currently under review two versions were used for the events and a third modified version is awaiting formal sign off from POCL.

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POCL RESEARCH

30 MAR 99 13:01 NO.004 P.017
Report on practice events.

11. Conclusion:

The trainer appraisals have been very favourable for a first attempt there is still room for improvement particularly in the area of timings although the timings did improve where a trainer delivered a subsequent event.
It would appear from some of the delegate appraisals that they expected balancing on the Counter Assistants course.
The appraisals annotated "Unsatisfactory" on "overall level of satisfaction" was because of the amount of information to be assimilated and the course content rather than any problem with the trainer's delivery.