ICL Pathway	**Training and User Awareness**	Ref:	BP/TRN/001
	Baseline Document	Version:	9.0
		Date:	05/07/99

Document Title: Training and User Awareness Baseline Document

Document Type: Reference Document

Abstract: This document provides a description of the ICL Pathway Training and User Awareness programme to be delivered to an agreed number of POCL staff and agents. This document forms the strategy for an agreed approach between ICL Pathway and POCL.

Status: APPROVED

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0 Document control

0.1 Document history

Version	Date	Reason
Issue 1.0	5.11.95	Training and User Awareness Baseline document in response to Requirement 915 submitted as part of the contract and original bid proposal, Ref. BP/TRN/001
Issue 1.1	10.11.95	Draft Baseline for discussion.
Issue 1.2	09.09.96	Draft Baseline.
Issue 1.3	15/5/97	Revised Baseline with ICL Peritas comments
Issue 1.4	20/5/97	Revised baseline with ICL Pathway comments
Issue 1.5	20/10/97	Revised as part of POCL/ICL Pathway Training review meetings. All inclusions have been discussed with POCL/ICL Pathway Programme Teams and have been minuted.
Issue 2.0	10/11/97	Final draft sent for review by POCL and comments prior to sign off (comments returned 17/12/97)
Issue 2.1	5/1/98	Further review by POCL and comments from sponsor reviews.
Issue 2.2	26/3/98	Review by POCL as a result of issues meeting
Issue 3.0	12/6/98	Final submission by ICL Pathway prior to commencement of NRO. Distributed for approval.
Issue 4.0	7/8/98	Revised final submission by ICL Pathway following internal review. Submitted to POCL as an attachment to CCN286.
Issue 5.0	21/8/98	Revised final submission by ICL Pathway following internal review following rejection by POCL of CCN286. Submitted to POCL as an attachment to CCN286a.
Issue 6.0	11/12/98	Revised baseline following POCL comments and revised CCN.
Issue 7.0	8/1/99	Revised baseline following comments from Alan Fowler and to ensure consistency with the TNA document
Issue 8.0	23/3/99	Sign-off list amended to refelct personnel changes.
Issue 9.0	05/7/99	Revised to reflect removal of BA, DSS and BES references following the outcome of the Treasury review.

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0.2 Approval authorities

Name	Position	Signature	Date
S L Kearns	ICL Peritas Training Project Manager		
Steve Lovegrove	ICL Pathway User Implementation Manager		
Jim Flynn	ICL Pathway Implementation Manager		
Douglas Craik	POCL General Manager of Horizon Implementation Team		
S. Reed	ICL Pathway Commercial Manager		
Liam Foley	ICL Pathway Business Development Director		
Andy Barkham	ICL Pathway Training and Awareness Manager		

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0.3 Associated documents

CP105 and Peritas document PATH-30-007	1.0	30/1/97	Agreed CP between ICL Pathway and POCL plus sub-contractor's impact statement and changes to contract wording.
IM/STR/0017	1.0	17/4/97	In Office Migration Release le
SU/TRN/0001	1.0	18/4/97	Training Needs Analysis
SU/TRN/006	1.0	26/11/97	Remedial Training
SU/TRN/005	1.0	29/10/97	Training Evaluation paper
IM/DOC/004	1.4	31/10/97	Implementation Programme Proposal
PATH/PUBS/001	4.0	09/06/98	Training and User Awareness Style Guide
BP/PRD/006	1.0	13/8/98	POCL Policy on competency testing (CAR 531.000.03)
BP/PRD/007	1.0	13/8/98	POCL Policy for Releasing staff (CAR 532.000.03)
IM/STR/0019	1.0	24/10/97	Training for Horizon Releases 1a to 1c
SY/REP/021	1.0	29/10/97	Standard Reports and Formats
IM/PRO/147	1.0	05/11/97	Procedure for ordering consumables for training events
IMP/REQ/014	1.0	27/05/98	Training Scheduling and Minimum Training Compliance
PATH/PROC/0004	2.0	03/06/98	Training Venue Administration

0.4 Abbreviations

TPAS	Training Project Administration System
POCL	Post Office Counters Limited
RNM	Retail Network Manager
HIM	Horizon Implementation Manager
TNA	Training needs Analysis
Scenario G	Training provided on software releases 1a to 1c up to "Live trial"
NRO	National Roll Out of training after live trial.
UA	User Awareness
MS	Microsoft
CAR	Contracting Authorities Responsibility
RLM	Regional Liaison Manager
SLA	Service Level Agreement

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MOR	Model Office Rehearsal
MOT	Model Office Testing
MTC	Minimum Training Compliance
New Release 2	Live Trial and National Rollout functionality as part of the original bid/contract baseline
New Release 2+	Update to the New Release 2 National Rollout platform to finalise functionality covered in the original bid/contract baseline.
New Release 3	New functionality and New products included on the Horizon platform as part of a separate costing and implementation proposal to POCL from ICL Pathway.
HSHD	Horizon System Help Desk
NGW	Nancy Groff Witton
HW	Horizon Hardware
SW	Horizon New Release 2 (and New Release 2+) Software
UK	United Kingdom
UAE	User Awareness Event
E-mail	Electronic Mail
Horizon	ICL Pathway's automated platform and New Release 2 (New Release 2+) system

Changes in this version

Revised to reflect removal of BA, DSS and BES references following the outcome of the Treasury review.

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0.6 Table of content

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1 Management Summary

The purpose of this document is to identify ICL Pathway's approach to the Training and User Awareness Programme, as part of the implementation of the Horizon system at post offices.

ICL Pathway Limited is a wholly owned subsidiary of ICL (International Computers Limited) and has been formed in response to the needs of Post Office Counters Limited (POCL) to automate the nation's post offices key service functions.

ICL Pathway has engaged a number of sub-contractors to deliver this programme and ICL Peritas has been selected to design, develop, deliver and manage the Training and User Awareness Programme. ICL Peritas is the UK's leading provider of Information Technology related training.

This document is being updated to reflect the changes that have been made to the Training and User Awareness Programme since the last ICL Pathway baseline document submitted in November 1995 as part of ICL Pathway's contractual solution. The reasons for the changes are covered in some detail by the associated documents referenced. The following points summarise the key changes which have been implemented :-

- The User Awareness event is no longer mandatory as proposed, but will be strongly recommended by POCL for all staff to attend, especially managers and subpostmasters.

- The user training has been changed from a four hour evening event followed by supported workbook based consolidation and learning to either a one day or one and a half day classroom training event (dependent upon job role).

- The competence test now takes place at the end of the extended classroom training event as stated above.

- There will be no workbook based learning in the baseline training solution for National Roll Out. Workbook based exercises will however be provided and are recommended for use back at the outlet. Workbook based learning will be considered for training on new software releases.

- The proposed After Care Visit (Training Review Visit) will not be undertaken by ICL Pathway.

- There will no longer be a specialist training help desk to support distance learning. The renamed Training Administration Centre will support user bookings and rescheduling activities and will also accept queries regarding workbook exercises via the Horizon System Help Desk.

This is by no means an exhaustive list of changes but identifies the key areas that have been altered in response to the various discussions which have taken place.

The new training solution is represented in Figure 1 (and supersedes the diagram shown in PATH-30-007, Section 2, page 4):
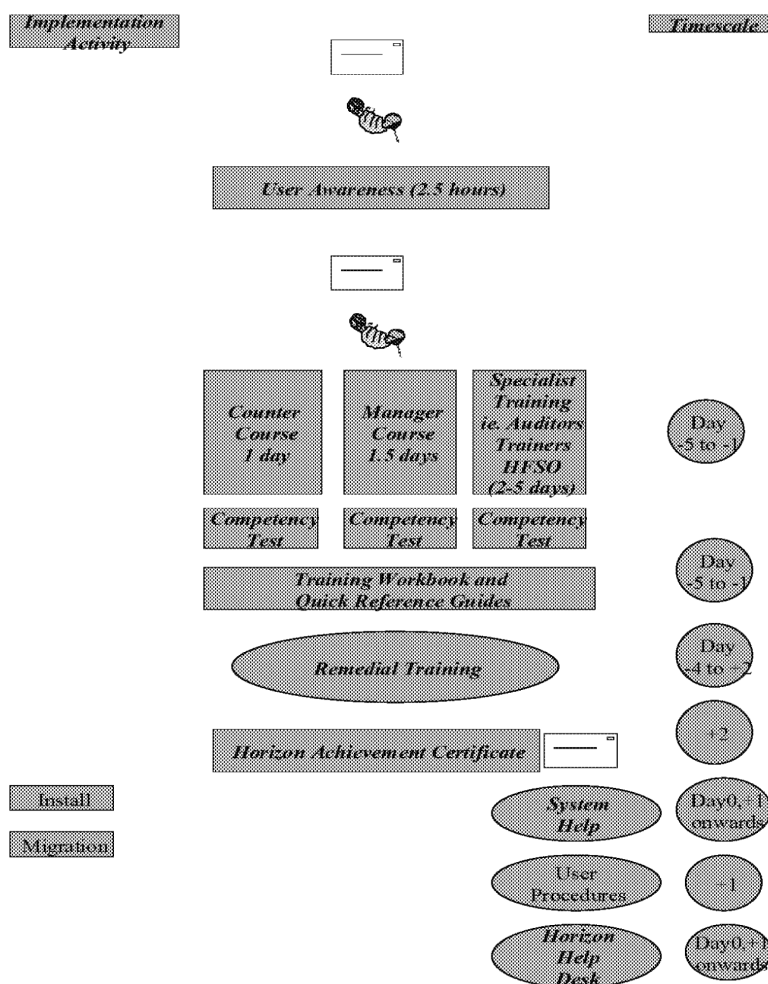
POCL shall use all reasonable endeavours to ensure that its Agents co-operate with ICL Pathway to the extent reasonably necessary to permit ICL Pathway to perform the training services described in this document.

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2   Scope

This document describes all the activities associated with the Training and User Awareness Programme, which continues up to the end of National Rollout. After National Rollout, training and user awareness will be carried out by POCL.

The activities can be summarised as follows:-

Programme Management and course booking system

Pre National Roll Out training

User Awareness and Training Development

User Awareness Delivery

Evaluation

UA Delivery

Training Delivery, Documentation and Competency Testing

Remedial Training

Training and User Awareness venues and catering

HFSO Training Review Visit (After care visit)

Management Reporting

The document also describes Update and New Product Training, which might be undertaken by ICL Pathway at POCL's request, subject to change control.

The scope of the training programme is also defined by the following:-

- Definition of users and their associated job roles   provided by POCL and documented as part of ICL Pathway Training Needs Analysis document reference SU/TRN/0001.

- ICL Pathway Migration Plan (Source: In Office Migration Release le, Version 1.0, reference IM/STR/0017. This document is soon to be updated to version 2.0 relating to Release 2 migration)

- Agreed course content (Source: ICL Pathway Training Needs Analysis, reference SU/TRN/0001).

- ICL Pathway Remedial Training document reference SU/TRN/006, Version 1.0.

- ICL Pathway Training Evaluation Paper reference SU/TRN/005, Version 1.0.

3   Programme Management

3.1   Management Team

The training programme management function is responsible for managing all services provided by ICL Peritas (on behalf of ICL Pathway), liaising with ICL Pathway Programmes Managers, ensuring that the training deliverables are fully integrated with the delivery schedules of ICL Pathway and other suppliers to ICL Pathway's Implementation Team.

The management function will also ensure that training resource availability incorporates sufficient contingency provision to ensure that no events are cancelled or increased due to a lack of training resource.

3.1.1   Implementation of the Training Project Administration System (TPAS)

The training project administration system provides facilities used to administer the delivery of training programmes and control of the supporting logistics management system. The work package will include the development of the import and export modules and customisation of the management reporting functions required to meet ICL Pathway and programme requirements.

ICL Pathway's sub-contractor (ICL Peritas) will locate a dedicated ICL Pathway Training Office in North West England, i.e. Stockport and will accommodate all office based staff. This accommodation will also provide adequate storage space to manage the documentation and equipment delivered as part of the training programme.

3.1.2   Key Roles

3.1.2.1 Training Project Manager

This role provides a single point of contact with responsibility for all aspects of the training programme, co-ordination of the activities within it, with those of the wider ICL Pathway programmes and those of the other sub-contractors to ICL Pathway.

3.1.2.2 Project Control Officer

This role is responsible for the administration of the project library, monitoring the progress against project plans and the administration of the commercial processes required to support the programme.

3.1.2.3 Training Team Leader

This role manages the selection of training staff and ensures that all training deliveries conform to the quality standards agreed with Pathway for the programme.

3.1.2.4 Logistics Manager

Responsible for the provision of logistical support to the training implementation. They will also manage the integration of ICL Pathway's sub-contractor and Pathway MIS interfaces.

3.1.2.5 Evaluation Officer

Responsible for building training evaluation criteria and operating the various measurement exercise required by POCL for the training activity e.g. course assessments, after course questionnaires etc. They will provide all management information to the Training Programme Manager.

3.1.2.6 Development Manager

Responsible for the overall management of all training and User Awareness event development.

3.2   ICL Pathway's Sub-contractor Booking System (TPAS)

ICL Pathway's sub-contractor training booking system has been tailored to meet contractual obligations regarding scheduling and invitations notice period. It has also been developed alongside ICL Pathway's Rollout Database system to ensure accurate and contractually compliant information is available and transferred electronically using approved file and report structures. This work has involved the following activities:

- Applications development
- System trials
- Integration trials with Pathway control system

The composition and specification of functional modules will be formally defined within an updated functional specification published after detailed consultation with ICL Pathway programmes office at Feltham.

In addition this system will provide additional ICL Pathway User reports regarding competency, attendance levels and scheduling details to ICL Pathway Programme Managers and POCL nominated representatives (for more details on reports and layout please refer to ICL Pathway Standard Reports and Formats document ref.

SY/REP/021). All reports will be transmitted via e-mail with some reports requiring POCL actions within 24 hours (or next working day).

3.3 Training Administration Centre

3.3.1 Description

A dedicated administration function manned with staff able to provide immediate assistance with:

- Logistics and content of the training programme
- Bookings and attendance on courses.
- General questions concerning training and user awareness programmes.
- Scheduling enquiries from nominated representatives.

The Training Administration Centre will undertake the following tasks:

- Import of installation schedules from ICL Pathway
- Generation of training and user awareness schedules to ICL Pathway
- Dealing with enquiries made from the HSHD to ICL Pathway's sub-contractor relating to Workbook Exercises
- Survey of post office training and UA requirements, e.g. completion of training booking forms
- Assignment of course places to training and UA schedules and re-scheduling bookings
- Issue of training and user awareness invitations from ICL Pathway's sub-contractor to users.
- Follow up confirmations to invitations and course joining instructions.
- Distribution of user implementation briefing packs if non-attendance at UA events.
- Ordering and despatch of supporting logistics
- Generation of attendance lists via reports to ICL Pathway and POCL Regional Representatives.
- Export of training and user awareness completion records to ICL Pathway's Rollout Database and via ICL Pathway's standard reports (as defined in ICL Pathway Standard Reports and Formats document reference SY/REP/021).
- Export of training competence test reports to ICL Pathway's Rollout Database and via ICL Pathway Standard Reports (as detailed in the above document).

- Export of training and user awareness statistics to POCL regional staff and ICL Pathway management.

3.3.2 Key Deliverables

- "Lo-call" telephone number for inbound queries from post office outlets.

- Operates 8.30am to 10.30pm Monday - Friday and 9.00am to 5.00pm on Saturday at the start of live trial training events up to the end of National Rollout in all POCL regions.

- Transaction logging will be maintained on all data changes to TPAS and automatically notified to the ICL Pathway Roll Out database.

- Call logging will be maintained on the HSHD on all enquiries passed to ICL Pathway's sub-contractor from the Horizon System Help Desk. Monthly reports will be issued to ICL Pathway.

3.3.3 Acceptance

There are performance measures covering:

- Reporting (Requirement 915)

- Course availability (Requirement 915)

- Course cancellations (Requirement 915)

3.3.4 Dependencies

- Specific call quality and performance measures will be agreed with ICL Pathway as part of the functional specification of the Training Administration Centre.

- POCL will receive updates via Training Review meetings scheduled during National Rollout.

- Agreed formats to ICL Pathway, POCL and POCL Reports as outlined in ICL ICL Pathway Standard Reports and Formats document, reference SY/REP/021.

- Compliance to ICL Pathway internal SLA's in accordance with ICL Pathway's sub-contractor's contract and performance measures. This is required in Excel format as provided by ICL Pathway.

4   Training pre National Roll Out

4.1   Horizon Releases 1a to 1c

The replanning of the implementation programme for Horizon into controlled phases has meant that the awareness and training events received by the users has had to be redefined. In line with best practice and contractual requirements, users will need to receive training associated with the functionality of the system or upgrade. Training

should use (where appropriate) existing processes and procedures which have been defined for Live Trial and National Rollout though no formal Service Level Agreement (SLA) measurement will apply for Release 1a to 1c training.

The phasing of the implementation of Horizon functionality also means that some outlets will require upgrade training as the facilities and services available to them are expanded.

The ICL Pathway Horizon Training for Release 1a to 1c document (dated 24/10/97, reference IM/STR/0019) describes the training programme for the different releases of Horizon and how it will be implemented. This has been agreed and signed off by POCL.

5 User Awareness & Training Development

The User Awareness programme is being developed to encompass the split in implementation between the new infrastructure programme and the main implementation programme (this is described in detail in ICL Pathway Implementation Programme Proposal document, reference IM/DOC/004).

The User Awareness event is aimed at ALL users working within, or providing support to, post offices. The purpose of the event is to provide a understanding of the impact the impending installation and automation programme will have on them as individuals and their outlet as a whole. The overall aim is to elevate concern users may have of the Horizon system and encourage participation during training and installation.

5.1 Description

The Horizon training portfolio will comprise:

- User Awareness event (2.5 hours)

- Subpostmaster/POCL Managers course (1.5 days)

- Counter Assistants Course (1 day)

- POCL Train the Trainer course (5 days)

- Other POCL staff specialist course (up to 2 days) based upon the postmaster or outlet manager course for non users of the platform and other POCL staff as defined in ICL Pathway TNA document. This will also cover any staff who will be changing role to a management function. It is expected that these will be identified by POCL as part of an agreed booking process and procedure between ICL Pathway and POCL.

5.2   User Awareness Key Deliverables

A formal Training Needs Analysis which defines the training requirements, assesses the expected volumes of users to be trained and contains specifications for all training events as part of New Release 2 (and New Release 2+). ICL Pathway Training Needs Analysis document SU/TRN/0001, constitutes this deliverable.

User Awareness Description **(Cross reference: 2.2.1 "Description")**

A seminar style face to face presentation delivered in a lecture environment, which provides all staff who work within a post office, with an overview of the ICL Pathway project and a detailed understanding of both the user functions and the training support functions provided by the project. **(Para 1)**

There will be an ICL Pathway team to deliver each event consisting of **(Para 3)**

- Change Management Consultant
- Trainer
- Administrator

In addition, a POCL Manager will be present at each event. **(Para 4)**

Development deliverables for the User Awareness event **(Cross reference 2.2.2 "Key Deliverables"**

This will comprise a formal course kit containing:

- Event specification **(Bullet point 1)**
- Event invitation **(Bullet point 2)**
- Event questionnaire **(Bullet point 3)**
- User Implementation Guide (issued to users at the event) **(Bullet point 5)**
    - Implementation process overview
    - Training programme guide
- Event Design and Development **(Bullet point 4)**
    - Preview video **(New)**
    - Agree Video storyboard and scripts **(Cross ref. 2.2.3 "Acceptance" bullet point 2)**
    - Agree presentation scripts **(New)**
- Dry run to sample users **(Cross ref. 2.2.3 "Acceptance" bullet point 6)**
- Scripted demonstration (for presenters only) **(Bullet point 7)**
- Prepared questions and answers to be provided by POCL (for presenters only) **(Bullet point 8)**

Training Description (Cross reference 2.3.1 "Description")

The objective of the training is to ensure that all staff who work in post offices are competent in the use of the automated platform, are aware of the impact on operational procedures of that platform and that specialist staff are provided with the appropriate additional information to perform their job role within an automated post office. **(Para 1)**

The proposed solution offers three main training streams, namely:- **(Para 2)**

Managers (Cross reference 2.3.1 "Managers")

- A 1.5 day contiguous training event delivered over two days to include venue set up and clear down. **(Bullet point 1)**

- This course would be targeted at staff who are required to understand the full functionality of the automated platform. **(Bullet point 4)**

- It is understood that all management grades will need this training. It is also understood that other staff may perform these tasks, in some cases as back up, and they will also need the Managers training event. **(Bullet point 5)**

Counter staff (Cross reference 2.3.1 "Counter staff")

- A one day contiguous training event**. (Bullet point 1)**

- It is recognised that some of these staff, who perform some management functions, will attend the above 1.5 day event instead of this one as more fully defined in paragraph 8.3 of this document. **(Bullet point 5)**

Specialist staff and HQ roles: (Cross reference 2.3.1 "Back office audit" and "POCL Train the Trainer")

    Back Office Audit

    This is a two day course based on the content delivered to the systems managers but tailored to meet the needs of the central audit office of the Post Office. The same course will be taken by computer auditors and regional auditors. **(Para 1)**

    POCL Train the Trainer

    This 5 day course is aimed at existing POCL trainers, who will be training both existing staff and new staff on the automated counter transaction system. **(Para 1)**

Development deliverables for each training event

This will comprise a formal course kit containing:

- Loose leaf workbook (issued to users at the event)

- Quick reference guide (issued to users at the event)

- Ring Binder for workbook (issued to users at the event)

- Formal script and session plans (for presenters/trainers only)

- Course kit binder (POCL and ICL Pathway's Train the Trainer event only)

- Slides

- Review forms and questionnaires (to be completed by users as part of the event)

- Competence test (completed as part of the event)

5.3 Development Acceptance (Cross reference 2.3.3 "Acceptance")

- ICL Pathway Training Needs Analysis document reference SU/TRN/0001, Version 1.0 (approved and signed off by ICL Pathway 19/3/97 and by POCL on the 22/4/97). **(Bullet point 1)**

- Structure and format of training materials to be approved by ICL Pathway and POCL as part of formal acceptance. **(New)**

- Sign off as part of the training course dry run process. **(Bullet point 2 reworded)**

- Video sessions will be agreed by POCL and ICL Pathway prior to ICL Pathway's internal dry run as part of a separate Training Review meeting. **(New)**

- Training materials i.e. training workbooks and quick reference guides will be signed off as part of a "Fagin" review and inspection carried out by ICL Pathway and POCL. **(New)**

- Formal written notification of acceptance is required from POCL before commencement of National Rollout Training. **(New)**

5.4 Development Logistics (Cross reference 2.3.4 "Logistics")

- All Training and Awareness documentation will be produced and distributed by ICL Pathway's sub-contractor on behalf of ICL Pathway. This excludes the distribution of POCL material. **(New)**

- ICL Pathway will provide training systems for demonstration purposes. **(New)**

- Version control of ICL Pathway documents and training materials will be operated on all training documentation. Once baselined, all documentation will be subject to a formal change control process. **(New)**

- ICL Pathway's sub-contractor will offer a service that secures the delivery accommodation, issues the invitations to the events and manages the delivery schedule and management information. This will be co-ordinated via the Training Administration Centre complemented by the logistics management function. **(New)**

- Trainer gear up will be accomplished via a 3 week training programme. **(Bullet point 1)**

5.5   Development Assumptions (Cross reference to 2.2.5 "Assumptions")

- There will be 60 days notice of product updates from ICL Pathway and POCL to ICL Pathway's sub-contractor. This will form part of a formal specification of requirements to ICL Pathway who will cost and assess within a 2 week period from notification, with a further 60 days required for development purposes and acceptance. **(New)**

- Formal notification of the volumes of materials and distribution schedules will be available from ICL Pathway's sub-contractor for ICL Pathway's approval prior to notification of New Release 2 (New Release 2+). **(New)**

- Training attendance is mandatory for all users who work in post offices. **(New)**

- User Awareness event content is identical for all staff. **(Bullet point 1)**

5.6   Development Dependencies

- Availability of suitably qualified users to attend dry runs. These should be representative of the target audience for each event.

- Assistance with development material from POCL specialist staff e.g. POCL Security and Audit.

- Software availability dates as required by ICL Pathway's sub-contractor will be met by ICL Pathway prior to MOR and MOT.

- 60 days' prior notice of any new product updates after New Release 2 from POCL to ICL Pathway.

- POCL and ICL Pathway will be reviewed against SHARED project "handshake" milestones/project plans. This will be co-ordinated by POCL and ICL Pathway project teams and reviewed within agreed timescales.

- Formal project plans are received from ICL Pathway's sub-contractor to ICL Pathway in a timely manner within agreed timescales. This is an ICL Pathway management activity only.

- Updates on training progress and development activities are delivered within project timescales.

- Formal ordering and invoice processes to be documented between ICL Pathway and ICL Pathway's sub-contractor prior to submission to ICL internal account teams.

- ICL Pathway's sub-contractor to notify ICL Pathway of any cost saving regarding the use of POCL venues used within the ICL Pathway training programme. This

process will be agreed between ICL Pathway and POCL and documented accordingly.

- All invoices and requests for orders are accompanied with 'back up' or supporting material as proof of delivery. This is an ICL Pathway management activity only.

- POCL will advise staff that managers are expected to attend a Managers event. In the case of sub post offices, if the Postmaster cannot attend then he will appoint a deputy.

- ICL Pathway Programme function will be responsible for advising the offices planned for implementation in the appropriate time scale.

- ICL Pathway will provide training systems for awareness and training events.

5.7 Training Documentation (Cross reference 2.5 "Description")

Users on all courses will receive a training workbook comprising the following: **(Para 1 reworded)**

- Quick reference guides **(Bullet point 1)**

- A workbook **(Bullet point 2)**

  - This contains classroom exercises (carried out as part of the training event) and activity review sheets (carried out as part of "after training" consolidation). Some questions may be used during the training event so the trainer can gauge students' reaction to a particular training session. This will assist with trainers' understanding on where individual user support is needed. There is also the opportunity to use training mode to practice all transactions carried out at the counter using counter procedures manuals). These will be completed at users' discretion, on or after their training event but will be an optional activity. **(New)**

  - Course notes **(New)**

  - Training ring binder **(New)**

  - Sample bar-codes, training APS cards (1 pack per outlet) **(New)**

The training workbook is a loose leaf document contained within a training binder. It contains the following module related structure (as stated in ICL Pathway document reference PATH-30-007, dated 30/1/98, section 2.5): **(Para 2 reworded)**
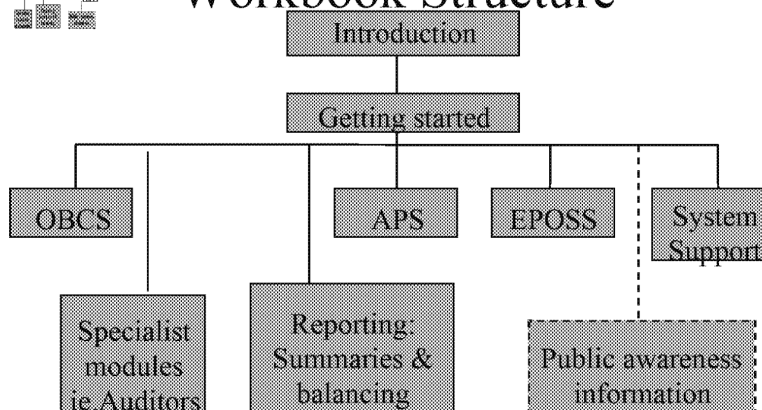
The workbook will be double sided, in monochrome, provided in a ring binder. Should system functionality change or expand, and additional pages be required, a change control request will be needed (Cross reference to Schedule A15 for approved process). **(Para 3)**

The Quick Reference Guide is a one or more, A4 tri-fold colour sheets covering: **(Cross reference to 2.5 "Quick reference guide")**

- Getting Started **(Bullet point 1)**
- Basic System Process **(Bullet point 2)**
- Benefit Payments OBCS **(Bullet point 3)**
- EPOSS/APS **(New)**

(Cross reference 2.4 "Description")

An electronic training mode on the automated platform which can be used in conjunction with a workbook of exercises for self study periods in order to: **(Para 1)**

- Refresh use of system after training. **(Bullet point 1)**
- Provide drill and practice to increase speed and accuracy. **(Bullet point 2)**
- Provides an opportunity to practice on linked (end to end) transactions using counter procedure manuals (plus training scenarios) thus consolidating knowledge. **(Bullet point 3 reworded)**

Assumptions (Cross reference 2.4.5 "Assumptions")

- Training workbooks will be kept updated as system versions change (up to new Release 2+) for new outlets to Horizon as part of National Rollout. Once training for an outlet has been completed no further training materials will be sent to that outlet, whether for new staff, product or system updates, unless ordered by POCL. **(Bullet point 1 reworded)**

- All training documentation will be produced and distributed by ICL Pathway's sub-contractor to users as part of their training event. **(New)**

- Version control will be required on all training materials during National Rollout. **(New)**

Dependencies

- POCL will carry out a formal review on training workbooks prior to MOT.

- Sign off by POCL and ICL Pathway by the end of MOT.

6   Evaluation (Cross reference 2.10 "Description")

6.1   Description

ICL Pathway will provide Kirkpatrick conformant level 1 and level 2 evaluation comprising: **(Para 1 reworded)**

- A training questionnaire i.e. course appraisal form administered at the end of each training event (Level 1) **(Bullet 1 reworded)**

- A competency test. One hour allowed for completion (Level 2) **(Bullet 2)**

6.2   Key Deliverables (Cross reference 2.10 "Key Deliverables")

- Overall competency test will not exceed a duration of 1 hour. **(2.10 - Para 1, Bullet 2)**

- ICL Pathway's sub-contractor certificate for successful candidates. This will be sent to delegates after the course. **(Bullet point 1)**

- Reporting on level 1 questionnaire results. **(Bullet point 2)**

- Reporting on competency level results. **(Bullet point 3)**

- Reporting on competency level failure analysis. **(Bullet point 4)**

- Venue appraisal form completed by users as part of their training event (this is handed to the trainer at the end of the course for review). **(New)**

- Training or Awareness course appraisal forms will be completed by users at the end of their event and handed back to the trainer for review before leaving the training or awareness venue. **(New)**

- ICL Pathway's sub-contractor will forward a certificate for users who pass the competency test. This will be known as the Horizon Achievement Certificate and will be sent to delegates after the course. This certificate will identify the level of attainment in terms of job category as: **(New)**

  - Trainer

  - Auditor

  - Subpostmaster or Outlet/POCL Manager

  - Counter Assistant

- Regular reporting on level 1 of the Kirkpatrick model will report course appraisal results. These are e-mailed to ICL Pathway and POCL by ICL Pathway's sub-contractor for review weekly or monthly. (This will be dependent upon POCL's written confirmation of preferred option i.e. weekly or monthly). **(New)**

- Regular reporting on level 2 of the Kirkpatrick model will report competency level results. This is e-mailed to ICL Pathway and POCL by ICL Pathway's sub-contractor within 24 hours or next working day. This will require the same turnaround from both sides for actioning as part of POCL CAR 531.000.03 document reference BP/PRD/006. **(New)**

- In addition reporting and analysis of competency tests will be e-mailed by ICL Pathway's sub-contractor to ICL Pathway and POCL Regions as part of joint monthly review meetings between ICL Pathway and POCL (in accordance with ICL Pathway Standard Reports and Layouts document reference SY/REP/021). **(New)**

6.3　Acceptance　(Cross reference 2.10 "Acceptance")

ICL Pathway and POCL signed and agreed content of ICL Pathway Training Evaluation paper reference SU/TRN/005 covering: **(Para 1 reworded)**

  - Level 1 Questionnaire. **(Bullet point 1)**

  - Level 2 Competency test. **(Bullet point 2)**

Reports on Level 1 satisfaction and Level 2 competency test results are outlined within the ICL Pathway Standard Reports and Formats document reference SY/REP/021 agreed with POCL. **(Para 3 reworded)**

6.4　Logistics (Cross reference 2.10 "Assumptions")

ICL Pathway

- The course appraisal is completed prior to competency test. **(Para 1)**

- The competency test will be administered by trainers immediately after each training event to users under supervision. **(New)**

- If and when delegates have twice failed the competency test, ICL Pathway will be notified immediately by exception reports to POCL Regions and ICL Pathway via e-mail. This will be the responsibility of ICL Pathway's sub-contractor to distribute and manage. **(New)**

POCL

- The RLM and POCL will be notified by e-mail within 24 hours (or the next working day) of each and every test failure or subsequent pass. A turnaround of 24 hours (or next working day) is expected by POCL Regions to ICL Pathway's sub-contractor on action taken. **(New)**

- It is POCL's responsibility to ensure all users of Horizon platform attend remedial training, as arranged by ICL Pathway and understand the importance of a competency test. **(New)**

6.5 Assumptions

- All outlet users of the Horizon platform will be advised via POCL communications of POCL's requirements for a competency test and that it is their responsibility to ensure the process is understood regarding its impact and management. All results will be stored electronically via the ICL Pathway's sub-contractor's system (TPAS) with notification to users, as required by the Data Protection Act. This will be stored by ICL Pathway's sub-contractor during National Rollout, up to individual post office outlet acceptance and go live.

- Course appraisal forms are completed by users prior to the competency test.

6.6 Dependencies (Cross reference 2.10 "Dependencies")

- Agreed approach (set of words from POCL) for telling users they have failed a competency level. **(Para 1)**

- Formal agreement to words and criteria used for level 1 course appraisal and venue acceptability forms (for more information please refer to ICL Pathway Training Evaluation Paper reference SU/TRN/005). **(New)**

- Formal definition and agreed criteria between POCL, ICL Pathway and ICL Pathway's sub-contractor for level 2 competency test as part of POCL's CAR 531.000.03 reference BP/PRD/006, Version 1.0 (which has been agreed by POCL). **(New)**

- POCL commitment from delegates in undertaking a competency test and any remedial training required (as outlined in section 1 "Management Summary", fig.1 of this document). This is outlined in POCL's CAR 531.000.03, reference BP/PRD/006, and cascaded by both POCL Regions through internal communications. This will also be reiterated by ICL Pathway on the User Awareness events. **(New)**

- Agree how questions are selected from a pool of possible questions submitted by ICL Pathway's sub-contractor. **(Para 2)**

- Auto - what happens if questions does not relate to job role. National standard v non answer (counts as pass). **(Bullet point 2)**

- The following 5 evaluation forms will be contractually adhered to by ICL Pathway and ICL Pathway's sub-contractor as part of National Rollout (for more information please refer to ICL Pathway Training Evaluation paper reference SU/TRN/005). This complies to Requirement 915. **(New)**

  - User awareness appraisal (1 form)

  - Training course appraisal (1 form)

  - Venue Satisfaction (1 form)

  - Competency test (1 form)

  - Trainer assessment of each individual delegate (1 form)

As detailed in Requirement 915 "the training Services provided shall ensure that 95% of trainees on completion of the training shall be able to demonstrate achievement of the agreed level of competence, which shall reflect a score of 90% for knowledge related areas for transactions and the operating platform". To facilitate this ICL Pathway, via ICL Pathway's sub-contractor, will provide exception reports on failures within 24 hours (or next working day) to POCL representatives via e-mail. This will be documented in ICL Pathway Training Scheduling and Minimum Training Compliance document reference IMP/REQ/014. Both documents identify what action will be taken by the ICL Pathway and POCL Regions within 24 hours or next working day. After the third attempt by a user to pass the test, action will be taken by POCL. As part of this process POCL will require POCL Regional teams to communicate this to users as part of POCL's Horizon communications programme. **(New)**

Any further evaluation by ICL Pathway and ICL Pathway's sub-contractor on training will be subject to separate and additional agreement. **(New)**

- POCL will ensure that competency assessments are maintained for all users of the Horizon platform after site acceptance. This will be documented and agreed with POCL Regions in advance of completion of ICL Pathway's development activities. Any training events or training materials which are required by POCL from ICL Pathway to achieve this must be subject to separate and additional agreement between POCL and ICL Pathway. **(New)**

- Copyright for all training materials are the property of ICL Pathway's sub-contractor. Neither POCL nor users may make copies of any training material (either in part or in full) without ICL Pathway's consent. ICL Pathway will be pleased to quote POCL for the supply of additional or replacement copies. Subject to commercial agreement, an agreed ordering process between ICL Pathway and POCL should be put in place before the commencement of future training events during Live Trial and National Rollout. **(New)**

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- Turnover training is currently the responsibility of POCL.   All strategies and policy decisions regarding POCL's delivery will be documented and agreed between POCL and ICL Pathway.   All processes and procedures will be logged in both POCL and ICL Pathway libraries for reference purposes. **(New)**

7   User Awareness Delivery

This is a key deliverable of the training programme and helps familiarise users with the Horizon system prior to their training event and installation.

7.1   User Awareness Description (Cross reference to 2.2.4 "Logistics")

Attendance on the user awareness programme will be **strongly recommended** for all staff and will be delivered locally to reduce travel. **(Para 2)**

ICL Pathway's sub-contractor propose to run a series of evening events in locations throughout the UK which will consist of a formal presentation and demonstration. ICL Pathway's sub-contractor will control the mailing of invitations to users. It is anticipated that each event should target 90 attendees in the urban areas, 50 in rural and 30 in the Highlands and Islands**. (Para 2)**

(Cross reference to 2.2.1 "Description")

This consists of a seminar style face to face presentation delivered in a lecture environment. This will provide all users and POCL staff with an overview of the ICL Pathway programme as a whole helping to identify key roles and responsibilities both within ICL Pathway and the POCL Regions. It will assist with users' understanding of the Horizon system, the training and support programmes which are in place, along with key user messages regarding business change and the future of POCL. **(Para 1 reworded)**

The objectives of the User Awareness event are to: **(Para 2)**

- Gain user commitment to the training, installation and support programmes.

(Bullet point 1 reworded)

- Increase user awareness of the Horizon system, its training programme, its installation and migration activities. **(Bullet point 2 reworded)**

- Increase level of user ownership of the Horizon system and its use. **(Bullet point 3)**

- Provide a suitable forum to identify and respond to user concerns and issues regarding training, migration, on-going support and documentation. **(Bullet point 4 reworded)**

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7.1.1 User Awareness Key Deliverables <u>(Cross reference to 2.2.2 "Key Deliverables")</u>

- Event Specification **(Bullet point 1)**

- Event invitation **(Bullet point 2)**

- Event questionnaire. **(Bullet point 3)**

- Event presentation slides and script (for presenters only) **(New)**

- Implementation guide (distributed as part of the event) **(Bullet point 5)**

This includes:

- ■ User Implementation Process overview **(Bullet point 5 - first sub bullet)**

- ■ Installation process overview **(New)**

- ■ Training programme guide and booking procedure **(Bullet point 5 2nd sub bullet)**

- ■ Migration and after care support overview **(New)**

- Video sessions are used to support presentations (for presenters only) **(Bullet point 6 reworded)**

- Scripted demonstration (for presenters only) **(Bullet point 7)**

- Prepared questions and answers (to be provided by POCL for presenters only) **(Bullet point 8)**

(Cross reference to 2.2.1 "Description")

There will be an ICL Pathway's sub-contractor team to deliver each event consisting of a lead trainer and presenter, a trainer for demonstrations (who can also act as lead trainer and presenter) and an administrator (who is a Horizon trainer). This allows eases delivery, as well as contingency at the event itself, in case of sickness. **(Para 3 reworded)**

In addition, a POCL Manager may be present at each event (this is not mandatory, but is seen as a positive partnership approach). **(Para 4 reworded)**

7.1.2 User Awareness Acceptance <u>(Cross reference to 2.3.3 "Acceptance")</u>

Contractual performance measures cover: **(Bullet point 3)**

- Course availability (Requirement 915)

- Venue quality (Requirement 915)

- Training course quality (Requirement 915)

- Cancellations of courses (Requirement 915)

- Training course feedback by trainers (Requirement 915)

- Delivery (as described in the ICL Pathway Training Scheduling and Minimum Training Compliance document reference IMP/REQ/014)

7.1.3 User Awareness Logistics (Cross reference to 2.2.4 "Logistics")

ICL Pathway's sub-contractor will offer a service that secures the delivery accommodation, issues the invitations to the events and manages the delivery schedule and management information. This will be co-ordinated via the Training Administration Centre complemented by the logistics management function. **(Para 1)**

Events will be delivered within a 30 mile radius to reduce travel due to availability of suitable venues. This is largely due to the maximum size of venue required to accommodate 120 people and Health and Safety Regulations. ICL Pathway's sub-contractor will deliver a series of evening events in locations throughout the UK which will consist of a formal presentation and demonstration. ICL Pathway's sub-contractor will control the mailing of invitations to users. Each event should have a maximum of 90 to 120 attendees within the implementation requirements defined by the ICL Pathway Roll Out database. **(Para 2 reworded)**

The timing of the events should be in line with the overall implementation plan and are planned approximately seven weeks prior to the installation date. More information relating to timescales and approach is contained in ICL Pathway Implementation Programme Proposal document reference IM/DOC/004. **(Para 3 reworded)**

All events will start at 7.00pm with a demonstration, the main event will start at 7.30pm, unless specifically agreed beforehand between ICL Pathway and POCL. **(Para 4 reworded)**

Horizon systems will be available at each event and demonstrations will be given before and after the main seminar. The presentation will be driven directly to a large display and developed using MS-PowerPoint. **(New)**

Non attendees will be sent the user implementation guide (as provided to attendees at the User Awareness event) along with a covering letter plus a copy of the UAE video. User implementation guides will only be sent to outlets for which no user awareness attendees have been logged. Only one guide per outlet will be sent. **(New)**

Administration of the event will be undertaken by ICL Pathway's sub-contractor. **(Para 7 reworded)**

Management of venues will be undertaken by ICL Pathway's sub-contractor.

(Para 7 reworded)

7.1.4 Assumptions (Cross reference to 2.2.5 "Assumptions")

- User Awareness event content is identical for all users. **(Bullet point 1)**
- User Awareness attendance is strongly recommended for **all staff** who work in post offices. **(Bullet point 2)**

- POCL staff, particularly RLM's, HIM's and RNM's will proactively encourage attendance. **(New)**

7.1.5 Dependencies (Cross reference to 2.2.6 "Dependencies")

- POCL will advise POCL staff and potential Horizon users and outlet managers that attendance is expected at this event. In the case of Outlets, if the subpostmaster cannot attend then he or she will appoint a deputy. All subpostmaster assistants and POCL staff will also be strongly encouraged to attend to ease transition to the Horizon platform. **(Bullet point 1 reworded)**

- ICL Pathway Implementation Programme function and Rollout team will be responsible for advising ICL Pathway's sub-contractor of the offices planned for implementation in the appropriate timescales. **(Bullet point 2)**

- ICL Pathway will provide training systems for demonstration purposes. **(Bullet point 4)**

- Large venues are required to accommodate attendance levels and meet with fire, health and safety regulations. The use of POCL venues is excluded from this section. **(New)**

- POCL will provide one manager at each event. This will normally be the RLM or his/her nominated deputy. **(Bullet point 3)**

8   Training Delivery

8.1   Description (Cross reference 2.3.1 "Description")

The overall training approach during for Live Trial and National Roll Out will be to deliver classroom based events. A full competence test will be introduced for the National Roll Out phase and integrated into the timing for the event. A workbook will be issued to enable staff to practice during their training event. **(New)**

The objective of the training is to ensure that all staff who work in post offices are competent in the use of the automated platform, are aware of the impact on operational procedures of that platform and that specialist staff are provided with the appropriate additional information to perform their job role within an automated post office. It is also compulsory that all users of the Horizon platform complete a training event (within the contractual training window reference Requirement 915) and a competency test. **(Para 1 reworded)**

The proposed solution offers five main training streams, namely: **(Para 2 reworded)**

- Managers 1.5 day event is aimed at subpostmasters, branch managers, RNMs, Regional Support staff, franchise managers, outlet managers,

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nominated deputies for an outlet/Relief managers, Heads of Retail Network, POCL User Acceptance team, POCL staff who perform stock balancing and POCL nominated staff.

- Counter Assistant 1.0 day event is aimed at branch and subpostmasters' assistants/staff, POCL retail assistants and Franchise staff).

- Auditors 2.0 day event is aimed at National and Regional Auditors, POCL Security and Investigators.

- Train the Trainer 5 day event is aimed at POCL trainers.

- POCL Helpline event is aimed at POCL Helpline staff and managers.

These are detailed below.

8.2 Managers 1.5 day event (Cross reference to 2.3.1 "Managers")

- A 1.5 day contiguous training event delivered over two days (to include venue set up and clear down procedures (within the working day). **(Bullet point 1)**

- A competency test would be undertaken at the end of the course. **(Bullet point 2)**

- The course will be completed not more than five working days prior to the date an individual outlet is planned to undertake live operation. **(Bullet point 3)**

- This course would be targeted at staff who are required to understand the full functionality of the automated platform including balancing activities. **(Bullet point 4)**

- It is understood that all management grades will need this training. It is also understood that other staff may perform these tasks, in some cases as back up, and they too will attend this training (this was originally stated in PATH-30-007, dated 30/1/97, Section 2.3.1, "Managers" bullet point 5). **(Bullet point 5)**

8.3 Counter Assistants 1 day event (Cross reference to 2.3.1 "Counter staff")

- A one day contiguous training event (i.e. not two separate half days). **(Bullet point 1)**

- The course will take place within the working day and be completed not more than five working days prior to that individual outlet being planned to undertake live operation. **(Bullet point 2)**

- A competency test will be completed at the end of the course. **(Bullet point 3)**

- It is understood that subpostmasters assistants, counter assistants and retail assistants would be the principal audience. A single course for all these job roles reflects POCL policy for counter operations and ensures a national standard of competence. (this was originally stated in PATH-30-007, dated 30/1/97, Section 2.3.1, "Counter staff", bullet point 4). **(Bullet point 4)**

- It is recognised that some of these staff, who perform some management functions, will attend the above 1.5 day event instead of this one. (this was originally stated in PATH-30-007, dated 30/1/97, Section 2.3.1, "Counter staff", bullet point 5). **(Bullet point 5)**

8.4   Other identified POCL staff (Auditors, Trainers, and newly promoted staff)

(Cross reference to 2.3.1."Back office audit" and "POCL Train the Trainer")

- **Auditors 2 day event (includes national and regional auditors, POCL security and investigators)**

    This is a two day course based on the content delivered to outlet managers but tailored to meet the needs of the central audit office of the post office. The same course will be taken by computer auditors and regional auditors. **(Para 1)**

- **POCL Train the Trainer 5 day event (includes POCL trainers)**

    This 5 day course is aimed at existing POCL trainers, who will be training both existing staff and new staff on the automated counter transactions system. Regional staff will attend a similar event. Trained staff will be certificated upon successful completion of this event. **(Para 1)**

    As part of the Train the Trainer programme, ICL Pathway's sub-contractor staff will support the first live training delivery of each newly trained trainer (on a standard 1.5 day Managers event or 1 day Counter event being delivered as identified in this document). POCL training staff will be accredited to deliver ICL Pathway Managers course to Horizon users upon successful completion of their first event. POCL trainers will also be invited to attend a standard Managers training event in their Region to observe an ICL Pathway trainer delivery. **(New)**

    Trainer upgrade briefings will be available to existing POCL Horizon trainers for New Release 2+ Horizon software. Further upgrade programmes will be subject to a separate agreement and process between ICL Pathway and POCL and as outlined in Schedule A06 section 11.1 of the Authorities Agreement. Further accreditation will be required for new trainers during Rollout for New Release 2 and New Release 2+ onwards. (Costs associated for additional training events are covered in schedule A06, Section 11.1 as mentioned above). **(New)**

- At POCL's discretion newly promoted POCL staff can attend a similar event to outlet manager or counter assistant as appropriate to their role. Any newly promoted staff member who attends such an event will be scheduled within the specified course limits and places as outlined in section 8.8 of this document. This

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will meet ICL Pathway's contractual responsibility (Requirement 534) as outlined in the POCL Schedule A15. Each event delivered will be part of the National Rollout allocation and training schedule.   Booking staff on these events will be part of an agreed process between ICL Pathway and POCL and will be defined as part of POCL's internal procedures (for more information please refer to POCL CAR 532.000.03 document reference BP/PRD/007). **(New)**

8.5   Key Deliverables (Cross reference to 2.3.2 "Key Deliverables")

- Suitability of training venue will be measured by ICL Pathway (for more details on measurement criteria please refer to ICL Pathway Training Venue Administration document reference PATH/PROC/0004 and to Requirement 915). **(Bullet point 1 reworded)**

- Quick reference guide and workbook will be distributed on each event. Each workbook and quick reference guide will be produced by ICL Pathway's sub-contractor in accordance with the ICL Pathway Training and User Awareness Style Guide reference PATH/PUBS/001). **(Bullet point 2 reworded)**

- Trainer performance will be measured (for more detailed information please refer to ICL Pathway Training Evaluation paper reference SU/TRN/005). **(Bullet point 3)**

- Course will be to agreed specification (as described in the ICL Pathway Training Needs Analysis document reference SU/TRN/0001 for cross referencing to course specifications and workbook structures).   This will be measured by ICL Pathway. **(Bullet point 4)**

- Competency Test, administered at the end of each course. This will involve a 'Horizon Achievement Certificate' awarded to attendees who successfully complete the course by passing the competency test.   Please note that competency tests during National Rollout will be known to users as the 'Horizon Achievement Certificate'.   **(Bullet point 5 reworded)**

- Reporting and feedback to ICL Pathway (and POCL) will be in accordance with ICL Pathway Standard Reports and Formats document reference SY/REP/021. **(Bullet point 6 reworded)**

- Accreditation for POCL trainers up to New Release 2 (and New Release 2+) will be subject to an agreed process between ICL Pathway and POCL. **(Bullet point 7 reworded)**

- Trainers' course kit to be presented to ICL Pathway and POCL trainers as part of Train the Trainer events. **(New)**

- Copyright for all trainers' course kits (and updates) is the property of ICL Pathway's sub-contractor.   POCL trainers, users, or managers may not make copies of any training material without ICL Pathway's consent.   This also applies to style and layout. ICL Pathway will be pleased to quote POCL for

the supply of additional or replacement copies and sees this as a positive approach towards a managed service during National Rollout. Subject to commercial agreement, an agreed ordering process between ICL Pathway and POCL should be put in place before the commencement of future training events during Live Trial and National Rollout. **(New)**

- ICL Pathway trainer gear up will be accomplished via a three week training programme. **(Cross reference to 2.3.4 "Logistics" Bullet point 1)**

- Training venues (rooms) will be provided by ICL Pathway's sub-contractor. All venues will be subject to venue inspection and approval prior to use. ICL Pathway's sub-contractor will consider using POCL provided venues subject to inspection. Such venues would be paid for at budgeted rates. The current plan is to provide catering for all training events. This will comprise coffee two times daily and lunch. All venues will provide access for the disabled. **(Cross reference to 2.3.4 "Logistics" Bullet point 2)**

- Trainers will be provided by ICL Pathway's sub-contractor. ICL Pathway's sub-contractor will consider using POCL staff provided that they meet the appropriate quality criteria and are available for suitably long periods of time (at least 3 months). **(Cross reference to 2.3.4 "Logistics" Bullet point 3)**

8.6   Acceptance (Cross reference to 2.3.3 "Acceptance")

Contractual performance measures cover: **(Bullet point 3)**

- Course availability to users. (Requirement 915)

- Venue quality as rated by users. (Requirement 915)

- Training course quality (Requirement 915)

- Cancellations of courses (Requirement 915)

- Achieved competence levels (Requirement 915)

- Training course feedback by trainer on each delegate (Requirement 915)

- Delivery within appropriate time scale. (Requirement 915)

8.7   Logistics (Cross reference to 2.3.4 "Logistics")

- ICL Pathway to provide contingency for spares and equipment on ICL Pathway's trainers' vans. **(New)**

- ICL Pathway's trainer gear up will be accomplished via a three week training programme. This covers one weeks training to be a Sub-Postmaster, one weeks training to be an accomplished Pathway trainer, i.e. training techniques associated with the Horizon programme and one week to deliver and understand the Horizon system. **(Bullet point 1 reworded)**

- POCL to define their approach to training after site acceptance and outlet go live. This will be subject to ICL Pathway and POCL agreement. POCL's training policy will need to be communicated to POCL and agent outlets (as a separate activity by POCL), so that messages are consistent, and that ICL Pathway and POCL are complementary on way forward. **(New)**

- All Training materials i.e. course kits and Train the Trainer events will accredit POCL trainers to deliver an ICL Pathway event rather than a POCL variant which may be adopted for steady state training. There are no turnover training events offered as part of this baseline however additional events and course materials can be provided using the approved change control process (Cross reference POCL Schedule A15 and costings Schedule A06). **(New)**

- Training venues (rooms) will be provided by ICL Pathway's sub-contractor or POCL during Live Trial and National Rollout. All venues will be subject to venue inspection and approval prior to use by ICL Pathway (for more information please refer to ICL Pathway Training Venue Administration document reference PATH/PROC/0004). ICL Pathway will consider using POCL venues subject to inspection. Such venues would be paid for at budgeted rates. The current plan is to provide catering for all events. This will comprise coffee and tea twice daily. It is currently planned that a fixed price lunch will be provided on the first day only (as requested by POCL). All venues will provide access for disabled users and comply to Health and Safety Regulations (this is a contractual requirement). **(Bullet point 2 reworded)**

8.8   Assumptions (Cross reference 2.3.5 "Assumptions")

- Training days are Monday to Friday. **(Bullet point 1)**

- Volumes of users requiring training are as per Fig 8.1 (of this document). **(Bullet point 2)**

- All courses will start at or before 10.00 am. **(Bullet point 3 reworded)**

- There will be a maximum of 6 staff on each event. **(Bullet point 4)**

- Timing of events for outlets will be determined by ICL Pathway's Implementation Rollout database. **(Bullet point 5)**

- Timing of courses for specialist roles will be via ICL Pathway's order under written request from POCL. **(Bullet point 6)**

- The training audience will be a maximum of 72,000 post office staff, subpostmasters and assistants as defined in figure 8.1 overleaf. Timing of courses for specialist roles will be via ICL Pathway's order under written request from POCL. **(New)**

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- A maximum number of 12,600 courses will be run for the target audience of 72,000 users and whichever of these limits is achieved first will complete ICL Pathway's contractual commitment for delivery of training. The 12,600 courses anticipates 95% course occupancy. Within this number of courses a maximum of 5,504 one day Counter Assistants Courses will be run and a maximum of 7,004 one and a half day Managers Courses will be run. The balance of the 12,600 will be made up of a number of specialist courses such as Train the trainer events etc. **A full breakdown of all courses including managers, assistants and specialist are detailed below:**

PREVIOUS OFFER			CURRENT OFFER		
TYPE	DURATION	TOTAL			
			TYPE	DURATION	TOTAL
*Managers	1.5 days	6,596	*Managers	1.5 days	7,004
*Assistants	1.0 days	5,185	*Assistants	1.0 days	5,504
*Train the Trainer	5.0 days	25	*Train the Trainer	5.0 days	25
*Auditors	2.0 days	34	*Auditors	2.0 days	34
POCL Helpline	1.5 days	33	POCL Helpline	1.5 days	33
			Total		12,600

Key to audience types per course:

*Managers course = Branch managers, Assistant Branch manager (ABM), Postal Officer Assistant Branch manager (POA), subpostmasters, franchise managers, nominee managers, Head of Retail Networks (HORNs), regional support staff, relief or deputy managers, Retail Network Managers, Outlet managers, POCL User acceptance team, POCL staff who perform stock unit balancing, and nominated POCL staff and officers.

*Counter Assistants course = Postal officers, Counter Clerks, POCL retail assistants, subpostmaster's assistants and franchise staff

*Train the Trainer = POCL trainers

*Auditors course = National and Regional auditors, POCL Security and Investigators

POCL Helpline = POCL Helpline staff and managers

Fig 8.1 POST OFFICE USER ROLE BREAKDOWN

(Previously shown in PATH-30-007, dated 30/1/97, Section 2.1):

	Course Duration	No Staff	No User Aware Events	No Staff 1 Day Courses	No Staff Places	No MGT 1.5 day courses	No MGT Places
Postal Officers	1	6,500	7,200	1084	6,500		
Postal Officers	2	700				117	700
Branch Managers/ABM/POA	2	1,300	1,300			217	1,300
Retail Assistants	1	750	750	125	750		
Sub Postmasters	2	17,750	17,750			2959	17,750
Sub Postmasters Assistants	1	22,250	40,000	3709	22,250		
Sub Postmasters Assistants	2	17,750				2959	17,750
Franchise Managers	2	400	400			67	400
Franchise Staff	1	1,600	1,600	267	1,600		
Nominees & Staff	2	1,000	1,000			167	1,000
Retail Network Managers	2	350	350			59	350
Auditors	Specialist	200	0				
Post Office Security	2	100	0			17	100
POCL Helpline	Specialist	160	0			27	160
POCL Trainers	Specialist	130	0				
Regional Support Staff	5	150	0				
Heads of Retail Network	2	16	0			3	16
PDA User Acceptance Team	2	20	0			4	20
Total Staff		71,126	70,350				
Total Courses			704	5,185	31,100	6,596	39,546

Note: The regional support staff are also known as "buddies" or tutors in some documentation.

8.9   Dependencies <u>(Cross reference to 2.3.6 "Dependencies")</u>

- Agreed release rates of staff. <u>**(Bullet point 1)**</u>

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- Determination of % staff that must be declared competent prior to an outlet migrating to Horizon and going live. **(Bullet point 2)**

- Managers must be available for training any of Monday to Friday including Wednesdays. Scheduling will be Monday/Tuesday, Tuesday/Wednesday and Thursday/Friday. It will be necessary to schedule some managers courses on Tuesday/Wednesday in order to offer choice of training dates. **(New)**

- Staff must be declared competent prior to an outlet migrating to Horizon and going live. This will be defined by POCL as a matrix for use within ICL Pathway Implementation Roll Out Database for scheduling subpostmasters, outlet managers or relief managers onto training (Cross reference to POCL CAR 532.000.01 document reference BP/PRD/007). **(New)**

- Specialist training events i.e. Auditors, Investigators, RNMs, POCL trainers and other NON COUNTER personnel must be booked with ICL Pathway 6 weeks prior to the desired training event (using POCL's approved forms - Cross reference to POCL's document BP/PRD/007). POCL to ensure 6 people are booked and confirmed prior to raising a request with ICL Pathway and submitting relevant paperwork. Each event for such staff will have a maximum occupancy of 6 per event. **(New)**

- Invitations for each event will be generated by ICL Pathway's sub-contractor. All POCL specialist training requests and booking forms are to be sent electronically via a nominated POCL Course booker(s) to a nominated ICL Pathway representative. **(New)**

- It is the responsibility of POCL to ensure that all users of the Horizon system at the counter, during National Rollout, attend training and remedial training (where necessary to meet Minimum Training Compliance) within the training window as defined in Requirement 915. This has been contractually set by POCL (ref. Requirement 915) as not more than 5 days from installation and go live of the Horizon platform. Any changes to this process will need to be agreed jointly and follow normal POCL and ICL Pathway change control procedures (cross reference to Schedule A15 for more information regarding change control process). **(New)**

- POCL will release all identified specialist staff in accordance with National Rollout plan and course limits (6 per course) a minimum of 6 weeks before the first user goes live during Live Trial and National Rollout (and within that POCL Region). This will be based upon POCL's formal written instruction before delivery and invitations of any upgrade, Live Trial or National Rollout training programmes. **(New)**

8.10 Workbook practice and training mode

8.10.1 Description **(Cross reference to 2.4.1 "Description")**

Training mode on the automated platform, which can be used in conjunction with a workbook of exercises for self study in order to: **(Para 1)**

- Refresh their use of the Horizon system after training. **(Bullet point 1)**

- Gain an opportunity during Live Trial and National Rollout (for New Release 2 and New Release 2+ functionality as appropriate). **(Bullet point 2 reworded)**

- Provide practice on linked (end to end) transactions to help consolidate knowledge of the Horizon platform. **(Bullet point 3 reworded)**

Any subsequent releases will be subject to a separate agreement and training solution as part of ICL Pathway and Authorities Agreement Schedule A06. **(New)**

8.10.2 Key Deliverables **(Cross reference to 2.4.2 "Key Deliverables")**

- Training mode will be available from day one of installation at an outlet. This will cover transactions carried out as part of their training event. **(Bullet point 1 reworded)**

- Training workbooks covering training scenarios will be issued by ICL Pathway's sub-contractor to users on their training events and explained during all training courses. **(Bullet point 2 reworded)**

- Activity sheets i.e. question sheets will be available for users to complete during and after the course as part of their consolidation. This would be an option and not mandated. Each sheet will be designed by ICL Pathway trainers to help assist users in reinforcing their training covered as part of their training event. **(New)**

8.10.3 Acceptance

- Development of training mode is being undertaken by ICL Pathway with testing by ICL Pathway and POCL Model Office testing teams.

- The training workbook is a deliverable as part of MOT and is subject to a separate ICL Pathway and POCL review as part of training development prior to and during MOT.

8.10.4 Logistics **(Cross reference to 2.4.4 "Logistics")**

- ICL Pathway will provide training mode on all counter systems at the time of installation in post offices of New Release 2 (and New Release 2+). This would be subject to a separate agreement for subsequent releases i.e. new functionality or Release 3 onwards. **(Bullet point 1 reworded)**

- ICL Pathway's sub-contractor will prepare and distribute training workbooks for all new users who do not have Horizon, on training courses for New Release 2 (and New Release 2+ as appropriate). **(Bullet point 2 reworded)**

- POCL will distribute all POCL Counter procedures i.e. Horizon User Guide(s) in line with the Live Trial and National Rollout schedules (as provided by POCL project teams). All Horizon User Guide(s) will need to be made available by POCL to users at the counter at the start of go live during Live

Trial and National Rollout (for new Release 2 and New Release 2+).   All updates to the Horizon User Guide will be the responsibility of POCL. **(New)**

8.10.5 Assumptions

- Copyright for all ICL Pathway training materials for all courses (regardless of type) are the property of ICL Pathway's sub-contractor. Neither POCL nor users may produce copies of any training material (in part or in style) without ICL Pathway's consent. ICL Pathway will be happy to quote costs to POCL for the supply of additional or replacement copies (as appropriate). This is seen as a positive approach in offering a managed service to POCL during Live Trial and National Rollout. Subject to commercial agreement, an agreed ordering process between ICL Pathway and POCL should be put in place before the commencement of future training events during Live Trial and National Rollout.

- ICL Pathway and POCL are to agree a process for ordering workbooks for use on POCL training events as part of an ICL Pathway Procedure for Ordering Consumables for Training Events document reference IM/PRO/147. POCL are to ensure that this procedure or similar POCL procedure is adhered to within the POCL Regions or by POCL National Training Teams as appropriate.

- ICL Pathway's Training workbooks will be quality reviewed if required under ICL Pathway's change control process. Any future Release 3 (and onwards) upgrade programmes or new product training will be subject to separate workbook and costing agreements as outlined in ICL Pathway and POCL Authorities Agreement Schedule A06.

- All counter staff will have access to an up-to-date workbook during National Rollout.

- Staff contact training helpdesk (TPAS) if they need additional support.

8.11 Horizon Field Support and Migration Visit (information only)

ICL Pathway are not currently contracted to provide this service as described in section 8.11 however ICL Pathway recommends POCL to undertake this service. ICL Pathway will be pleased to deliver this service, subject to change control.

8.11.1 Overview Description (Cross reference to 2.7 "Description")

A specific visit to each post office following completion of the training programme. In the case of automated offices (all types) the visit will be planned to occur on installation or go live day. Also known as the Horizon Field Support visit. **(Para 1 reworded)**

The purpose of the visit is to ensure a smooth hand over to live running and ensure that all staff are operating without difficulty. Individual managers will be asked for specific guidance as to how the visit is to be used but in every case **all** staff will be observed for assistance regarding reinforcements of training. This will be managed as

part of a separate activity and does not involve ICL Pathway trainers. **(Para 2 reworded)**

It is ICL Pathway's experience that users require further support after training to help remember topics covered by their training event and build confidence in daily use. Therefore the Horizon Field Support visit is part of this document for recommendation purposes only. **(New)**

8.11.2 Overview Key Deliverables

This function will be carried out by POCL and, subject to change control, ICL Pathway as part of the Horizon Field Support Officer and migration role. This is not a deliverable under the Horizon training and user awareness programme. (For more detailed information please refer to ICL Pathway Release 2 In office Migration Strategy reference IM/STR/0017).

8.11.3 Dependencies

Not relevant as part of this document.

9   Remedial training

9.1.1   Description (Cross reference to 2.8 "Description")

Remedial training function becomes operable when any member of staff fails the competency test on completion of their assigned training programme. (For more detail please refer to ICL Pathway Remedial training document reference SU/TRN/006). Below is a summary of activities involved. **(Para 1)**

Remedial training will comprise any or all of the following: **(Para 2)**

- Attendance on another scheduled training event **(Bullet point 1)**

- A specially scheduled remedial training event scheduled immediately after each training event or the following day.   **(Bullet point 2)**

Staff will be given a choice wherever possible but the exact remedial training offered will be at ICL Pathway's sub-contractor's discretion and based upon logistical criteria. Marginal failures candidates will be offered additional support on a 1:1 basis. **(Para 3)**

Any contingency places factored into the training schedule caters for remedial training and choice of dates offered to users during Rollout. **(New)**

9.1.2   Key Deliverables

- All staff failing a competency test are immediately offered remedial training and support.

- It is recommended that all staff failing to reach the standard are immediately offered remedial training and support which may occur on the same day as their original training event or on a specific day. (This is required due to Minimum

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Training Compliance and go live during Rollout). The provision of such remedial training is consistent with the implementation timetable, this implies that such provision is focused on evening delivery and may occur on the evening of the same day as the original training event.

- An ICL Pathway certificate will be awarded for passing the competency test and reaching the required standard i.e. 90% accuracy. This will be known as the Horizon Achievement Certificate. Separate certificates will be available for job roles as defined in the ICL Pathway Training Needs Analysis document reference SU/TRN/0001.

- All remedial training will be completed within the 5 day contractual training window (Cross reference to Requirement 915 and ICL Pathway Remedial Training document reference SU/TRN/006).

9.1.3 Acceptance

The standard of competence required and competency test format will be agreed by ICL Pathway and POCL for each training event type i.e. Train the Trainer, Managers and Counter Assistants events.

9.1.4 Logistics

Remedial training and coaching sessions will be undertaken by ICL Pathway trainers and carried out at a training location with immediate notice to individuals for attendance.

Delegates failing the competency test will be offered:

- The opportunity to stay after the event for additional coaching and a competency test re-try.

- The opportunity to attend an additional training course the next day.

- The opportunity to attend an evening remedial session within the same working week as their initial training event.

In every case delegates will be offered the option of staying behind at the end of the course or being rescheduled on the next available event.

Managers will get the option of evening sessions on Tuesdays and Fridays, plus an additional session on Saturday am. This needs to be strongly encouraged by POCL Regions and POCL Project Teams.

Counter staff will get the option of evening sessions on Monday, Wednesday and Thursdays which will be in or outside their training area.

It is important to note that the trainer is always best placed to observe and recommend the most appropriate course of action in respect of achieving competency as they will have first hand experience of user difficulties. Where failure to reach competency is not Horizon system based, but due to lack of POCL transactional knowledge, recommendations via the ICL Pathway trainer's (e-mailed) report will instigate POCL

referral. This is documented by POCL as part of their contractual response to CAR 531.000.03, reference BP/PRD/006.

9.1.5 Assumptions

- Remedial training is only completed when the staff member successfully completes a competency test. Staff failing to achieve the standard on a third attempt will be referred to the Regional POCL representative or POCL manager for review. This referral will be the next working day after failing the third attempt.

- There will be no remedial training for POCL trainers, Auditors or non counter staff personnel.

- Installation is under threat if users do not attend remedial training and meet Minimum Training Compliance within the contractual window of 5 days from installation.

- Pass rate for competency tests is 90%.

9.1.6 Dependencies

- POCL to mandate training and remedial training as part of POCL's communication cascade. POCL Regional teams will target known outlets where attendance on previous programmes has been poor to encourage and stress attendance during Rollout.

- POCL to advise and document informing ICL Pathway on how to manage relief managers and their training during Rollout. This should be a documented process agreed by all parties i.e. POCL Regions prior to commencement of Live Trial and National Rollout invitations.

- Availability of POCL staff and users in outlets. **(Cross reference to 2.8 "Dependencies" - Bullet point 1 reworded)**

- Attitude of POCL staff and users to achieving the required competency standard and retaking a test. It is assumed that POCL staff and users will accept the requirement to achieve the required standard as mandated by POCL. In the event of this not being the case the ICL Pathway trainer will refer the case to ICL Pathway Programme Managers via the Rollout database and to POCL nominated representatives via ICL Pathway's sub-contractor exception reports.

- All users who are to be tested must have been briefed by POCL such that the requirements of the Data Protection Act have been met.

- Process for mandating training and remedial training is managed by POCL (for more information please refer to POCL CAR 532.000.03 document reference BP/PRD/007).

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10   Accommodation

10.1.1 Description

The provision of training venues and catering as agreed between ICL Pathway and ICL Pathway's sub-contractor are in accordance with Training Venue Administration document reference PATH/PROC/0004.

10.1.2 Key Deliverables

- The building will be in a state of good repair and be clean and tidy.

- Tea and coffee will be provided for all delegates during each event.

- In urban centres the venue should be accessible by public transport.

- The venue will have provision for disabled access where demand requires it.

- There will be separate toilet and cloakroom facilities for both sexes and at least one facility with disabled access.

- The room will be adequately lit, heated and ventilated.

- All rooms will be in compliance with Fire, Health and Safety regulations and carry public liability insurance.

- The training room should accommodate ICL Pathway's sub-contractor preferred room and furniture layout as described in ICL Pathway's sub-contractor's Training Venue Administration document reference PATH/PROC/0004.

10.1.3 Acceptance

- Acceptability of training venues is governed by ICL Pathway and POCL performance measure (as described in Requirement 915.

10.1.4 Logistics

- Sourcing and reservation of possible venues is the responsibility of ICL Pathway's sub-contractor Training Administration Centre. This is required 3 months in advance of booking.

- Inspection service by ICL Pathway and ICL Pathway's sub-contractor representatives only during Live Trial and National Rollout.

10.1.5 Assumptions

- POCL training venues will be used where suitable and available.

10.1.6 Dependencies

- Forward schedules of offices and possible POCL personnel are made available to ICL Pathway's sub-contractor by ICL Pathway not less than 16 and 8 weeks respectively prior to each event.

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- Venue bookings will vary in terms and conditions offered by ICL Pathway and ICL Pathway's sub-contractor and cancellation charges will apply for late cancellations to POCL respectively.

11 New Product and Update training (Release 3 onwards)

ICL Pathway are not currently contracted to provide this service however ICL Pathway will be pleased to deliver this service, subject to change control.

11.1.1 Description

ICL Pathway has the competence and resources to deliver update and upgrade programmes to POCL approval and acceptance but will be only be required to do so if and when a subsequent CCN is agreed. All these options will be at an incremental cost to POCL as outlined in Schedule A06 of the Contract. ICL Pathway will ensure that trainers have access to any New Release 2 or New Release 2+ updates and are properly trained so that they can provide training (where appropriate) to new users of the Horizon platform. This is also an option for future Update and Upgrade programmes at an incremental cost to POCL.

There are 3 categories of update defined for which there is a corresponding training strategy/policy: **(Cross reference to 2.9 "Description" - Para 1)**

Category 1: A new product which uses existing counter processes and equivalent procedures to those already being used. Policy: An updated workbook would be made available for staff to practise using training mode. **(Category 1)**

Category 2: A new transaction and/or new process within existing subsystems. An outlet update or series of seminar type briefings provide during the working day or evening respectively. **(Category 2)**

Category 3: A new subsystem, or major revision to user interface for existing transactions. Policy: Classroom training provided in half day, i.e. up to 3 hours, the timing of which is determined by trainee. Options being p.m. or evening. **(Category 3)**

The above options are available only at an incremental cost to POCL as described in paragraph 11 of this document (Cross reference to the Authorities schedule A06 for ICL Pathway Standard Costs) more information regarding options available are detailed below:

Options

- Development and distribution via 1st class post of an updated workbook plus the upgrade of the counter training mode facility and POCL/ICL Pathway training systems

- Classroom training provided as determined by POCL and ICL Pathway. Options being morning, afternoon or evening.

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- An outlet update or series of seminar/briefings provided during the working day or evening respectively.

- Interactive video via the Horizon platform in modular format with a tailored workbook.

- Self-teach and modular redeveloped Training mode

11.1.2 Key Deliverables for New Product Training if agreed (subject to separate cost and change control process)

- A revised workbook to be distributed to users as part of a Release 3 event. ICL Pathway's sub-contractor will update training materials during New Release 2 (and New Release 2+) only for new outlets to Horizon as part of National Rollout.

- An additional POCL trainer event by ICL Pathway's sub-contractor to maintain ICL Pathway's accreditation on new releases plus revised trainer's course kit.

- Development of training mode for the revised platform.

- Development and delivery of briefing events.

- Training systems up-graded and supported during implementation.

11.1.3 Acceptance

Acceptance will be by POCL sign off of the agreed training strategy for each discrete update by ICL Pathway.

11.1.4 Logistics

This will vary for each and every update programme depending upon the training strategy employed and agreed by ICL Pathway and POCL.

11.1.5 Assumptions

The choice and design of update programme will depend upon an impact assessment of the change. Programmes will always be subject to verification and sign off by ICL Pathway and POCL.

11.1.6 Dependencies

Workbook based training strategy will depend upon the availability of training mode and training development systems in the updated software version prior to the agreed update implementation programme.

# 12 Management Reporting & Performance Measures

12.1 Description

As part of Requirement 915 progress and exception reports are required from ICL Pathway's sub-contractor to ICL Pathway, POCL and POCL Representatives via e-mail. All reports are documented and have been agreed by ICL Pathway, ICL Pathway's sub-contractor and POCL programme teams as part of ICL Pathway Standard Reports and Formats document, reference SY/REP/021.

Training scheduling and compliance to POCL Minimum Training Compliance which is documented in POCL's CAR 532.000.03 reference BP/PRD/007.

Below shows a summary diagram of ICL Pathway's training schedule however for more information on end to end scheduling processes can be found in ICL Pathway Training Scheduling and Minimum Training Compliance document reference IMP/REQ/014.

Fig 12.1 POST OFFICE TRAINING TIMETABLE
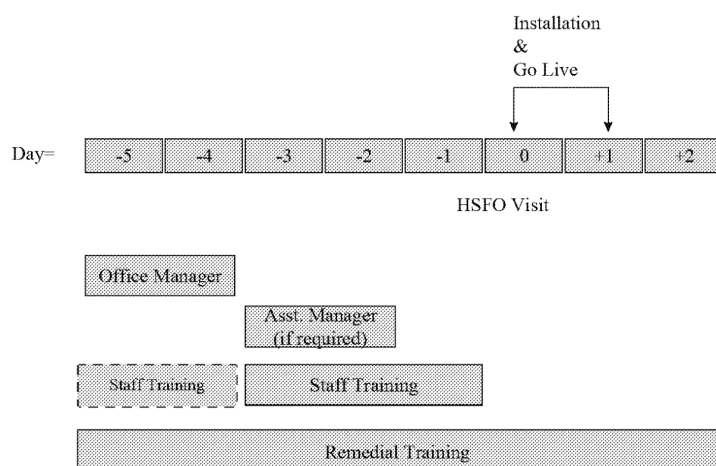
12.2 Key Deliverables

Reports for the User Awareness event covering:

- List of venue details

- Forecast versus actual attendance

- Qualitative response

- Comments report

Standard formats and formats have been agreed between ICL Pathway, ICL Pathway's sub-contractor, POCL and POCL Regions and are documented in ICL Pathway Standard Reports and Formats document reference SY/REP/021.

Reports for user training as part of Contractual performance measures cover:

- Course bookings and attendance.

- Venue quality of 85% satisfaction level.

- Training course quality of 95% user satisfaction level.

- Cancellations of courses. No more than 2% of course bookings may be cancelled at instigation of ICL Pathway's sub-contractor.

- Achieved competence levels. 95% of users to all courses must score at least 90% on their competence tests.

- Training course feedback by trainer on each user.

- Delivery within appropriate time scale. Training must be completed no more than 5 days before outlet installation date for the contractually agreed minimum number of staff and no more than 2 days after intended first operation for the remainder.

- List of training venues (non-contractual).

- Total numbers attending training by POCL Region (non-contractual).