

Witness name: Rita Palmer

Statement Number: WITN05360100

Dated: 19 December 2022

**POST OFFICE HORIZON IT INQUIRY**

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**FIRST WITNESS STATEMENT OF RITA PALMER**

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I, Rita Palmer, will say as follows:

1. This statement responds to a request for a written witness statement made to myself under the Inquiry Rules 2006 and concerns Phase 3 (Operation: training, assistance, resolution of disputes, knowledge and rectification of errors in the system) of the Inquiry.
2. The Inquiry believes that I hold information relevant to the issues which will be investigated by the Inquiry. However, as it relates to events that occurred up to twenty-six years ago, there are areas that I cannot recall and in these cases I have said so.
3. This statement has been drafted by myself and in my own words.

**General**

4. I left school in 1976 with eight 'O' levels and went to Strode College where I studied for a Private Secretaries Certificate at college for two years. I then worked in admin roles for the local Council and Conservative MP until I joined Post Office Counters Ltd in 1980 to work as a counter clerk in Wells Post Office. I worked there for about 17 years, during which time I deputised for the Postmaster on occasions. When I started on the counter everything was manual and accounting was with books and pencils and there was no automation. In 1997 there was an opportunity to become a Trainer for which I

applied and I was successful. I joined the Training team and between 1997 and 2012 I had various roles, including Trainer, Training Manager, Audit and Training Manager. In 2012 I applied to be a Field Change Advisor as part of the Network Transformation project and I did this role until I left the Post Office in September 2016. I am unsure of the dates that I fulfilled each role.

5. When the Horizon system was introduced (I am unsure of dates) I completed my initial training on a one week course in Leeds before the system was rolled out to the whole Network. I had some computer knowledge as I had done some evening classes at Strode College to gain qualifications in Word, Excel and Powerpoint. I had no previous knowledge of the Horizon system until this training. The training I received was adequate for me to be able to understand the serving and report menus and I was able to increase my knowledge and confidence as I used it for training. I was quite comfortable using the Horizon system as I had a good knowledge of the manual processes and products so it felt quite intuitive. I also had support materials describing the processes step by step if there was anything I needed to clarify. As it was introduced, as a trainer I helped new postmasters understand how to use the system for serving customers and completing their accounting. I also delivered training on the Horizon system in a classroom setting to new postmasters and counter clerks.
6. My roles in relation to the Horizon system included training new postmasters and staff, to show and explain on Horizon how the customer serving and daily/weekly accounting processes were used in the day to day work. I took new users through the screens and buttons showing them how to serve different products and services and how to complete daily and weekly

accounting. When the Training team and Audit team were joined together I did both roles and Branch Horizon systems were used to check that the accounts balanced and all the stock and cash was correct at the time of audit. Personally I didn't feel that the roles of Trainer and Auditor were appropriate to combine. There are different skill sets required to train people to adapt to different learning styles, whilst completing an audit is more process driven and people skills are not so crucial. Some of the auditors were uncomfortable delivering training and likewise some trainers were not comfortable completing audits. It was a job role change that was a business decision that we had to implement but I did not feel it was a change for the better.

### **Roles in Relation to Training**

7. With 17 years of experience working on the Post Office counter I applied for the role as a Trainer covering the Bristol area. I completed an application form and had a successful interview. My training to become a trainer was initially shadowing a current trainer, and then being shadowed myself when delivering training. Training was scheduled centrally and I would be given notice of which branches I would be training on which dates. I can't remember clearly but I think when I started the training on site for new postmasters was two weeks and then two balances but I know that was reduced during the time I was a Trainer. As well as on site training I also delivered classroom training to both new postmasters and new Post Office clerks. When Horizon was introduced I received training on the system in Leeds before I trained on site. I was in a training role between 1997 and 2012, initially onsite and classroom training, then I became a Training Manager, followed by Training and Audit Manager. The training schedule

centrally determined onsite and classroom training depending on the locations and the availability of trainers. I would not be able to estimate how many training courses I ran during that time. I did attend Train the Trainer courses and Training Skills courses during this time to update my own skills. These were generally internal courses but I think some were external although I cannot remember any qualifications received. I recall that some of the areas covered were Learning Styles and Objection Handling, as well as internal training when new products were introduced such as the Insurance products. I enjoyed learning about training and teaching as I felt that this added to my skills and benefitted my trainees. As this was so long ago I cannot recall specific feedback about the training or the Horizon system. I do recall that the feedback I received from my trainee was very positive and the support and help I gave during training was much appreciated. At the end of a course or onsite training feedback sheets were given for the trainees to complete feedback and give comments. As I recall these were put in an envelope and sent off so the feedback was anonymous. I am not sure when this was introduced.

8. I was a Training Manager for a few years, I can't recall the dates. During this time I line managed teams of trainers in the South West, in the centre of the South, and in South Wales. The names I can recall are Gaynor Davies, Paul Jones, Paul Holland, Haydi O'Brien, Alison Field, Craig Winks, Robert Hemes, Junaid Tanveer, Geoff Edwards, Kim Hobson, David Thomas. As best as I can recall the gist of the feedback received was always very positive as the trainees were pleased to get the support and help from the Trainer. Feedback

was received from the anonymous feedback forms and was discussed at 121's with the individual trainers.

### **The Training Programme**

9. When I started training I came under Bristol and the training we delivered was generally based on teaching how to complete the transactions based on our own knowledge. When the training was centralised, and I am not sure of the year that this happened, there was a Head of Training and then a group of Training Managers and trainers who were responsible for devising and updating the content and the materials for the classroom training and for use onsite. The training was offered to new postmasters and to new post office staff, and it was classroom and onsite. I delivered onsite and classroom. It was quite some time ago and over the period I was a Trainer/Training Manager the training offer changed quite a lot. It went from two weeks to one week, depending on what products the branch would be transacting. The onsite also reduced and instead of two follow up balances I think I remember when I left the follow up balance was a Trading Period one, although again I cannot recall fully. Classroom training was a maximum of 6 delegates due to the number of Horizon terminals in the classrooms, although these courses I found generally were not at maximum capacity, and sometimes only two or three delegates. Onsite the training was for the new postmaster, although towards the end of my time as a Trainer/Training Manager, some of the post offices had multiple new members of staff to be trained. In these cases there was a tick list for each member of staff to remember what they had learnt as they tended to work shifts so would not be in attendance for the whole training

period. The classroom content started with understanding Horizon and the screens, then covered the most common transactions, such as mails, learning how to process through Horizon and using practical examples. There was extra days added for branches that issued car tax and passports as this was not applicable for every trainee. There was time built in for discussing customer service and upselling products. Also there would be end of day accounting and balancing practice. Every trainee had different levels of ability and the classroom training gave them a start and an introduction but I don't feel it was enough on its own, so the onsite support that followed was really important. This was when they had the opportunity to put into practice the basics that they had learnt. Facing real customers and real transactions is very different to learning in a classroom.

10. As an onsite trainer, if I thought my trainee was going to struggle when left on their own, there was an option for me to flag for some extra training, dependent on the availability of resources. During the onsite training I would assess how well my postmaster was dealing with transactions, product knowledge, daily reports, etc. and if I felt that they were struggling there was a possibility of asking for some extra training if there was resource available on the training schedule. If I had another training course scheduled straight after then another trainer could be assigned and I would let them know what the gaps were and what they needed to do to help. It was quite rare for requests for extending training were not fulfilled and I can't remember any particular occasions or branches.

11. I have been asked to consider POL00033420 and POL00033637 and have very poor recollection of the trial for PO Essentials and PO Local although

both documents say to send feedback to myself. I can remember initial meetings to discuss PO Essentials and what transactions and products they should be able to transact and sell. The concept was that they would offer a limited amount of products and services and would not transact ones that needed paperwork or end of day reports. This would mean that the transactions were more straightforward and easier, there would not be a requirement for storage for lots of paperwork and forms, end of day would only require a cash declaration, and the balancing procedure would be easier. The format was intended for convenience stores with multiple members of staff. I have no recollection of the role out of these models or of receiving any feedback.

12. The spreadsheet POL00085132 is a record of all the training briefs used by the training team nationally. Areas were allocated to each Training Manager and they were responsible for making sure that the information in those briefs was reviewed and updated regularly, hence the dates for reviewing at different time of the year. This work could be delegated to their team members to help.
13. Considering POL00033632 and POL00033607 as a Training Manager I was allocated sections of the training package to review and this was discussed by the rest of the Training Managers at quarterly review meetings. With regards to the comment about the PSA, as far as I can recall, if a trainee had struggled to complete a process or did not understand how to do something, or it had not been covered, it was marked as RED on the PSA and should be carried forward as an Action for whoever was supporting further so they would know where more help was required. Because this was not an automatic

response on the PSA it was a concern that some actions were not being captured so if the command could be carried through actions would not be missed. Keeping the materials in the CTO's up to date was difficult as they weren't in constant use, but when a new course was due the prep was left until a day or so before the start of the course. If there were out of date leaflet or items missing from the prep box there would be no time to order in time for the start of the course, so earlier prep dates were considered an improvement. I wasn't completing transfer audits at this time but my team would have been and they would have flagged that trying to complete a transfer audit and actually getting the new postmaster in and opening up on the same day that the leaving postmaster has to balance and close was extremely difficult. If the published opening time on the transfer day was for the afternoon customers would be waiting and the transfer audit may not have been completed in time for opening.

14. Considering POL00033610 I believe these comments to be feedback from the individual trainers in my team which were put forward for consideration to make changes to the training offer. Some of these actions would have been put into place but I am not sure which ones. Sometimes the prep boxes for the materials being used in the classroom would contain out of date material which could be practical materials that had been changed but not yet updated in Swindon, or out of date leaflets. The reference to Day 6 stock balancing refers to the delegates completing a balance in the classroom on day 6 of the course but as they had already done a balance on a previous day and not completed any transactions on the system since, it would suggest and improvement to the course content to put some extra transactions in before

the Day 6 balance. With reference to the PTV, there was plans for a phone call at one month, followed by a visit at 3 months, then and audit at 6 months. Feedback from the onsite trainers was that the same questions were being asked each time even when the first time of asking the answer was positive so what was the purpose? It was felt that a visit rather than a phone call after a month would be better as you can discover earlier by attending an office if there are any problems, rather than over the phone. With regards for the requests for more 'practicals' in the classroom, it was an ongoing process to continue to develop more practical examples for products and services for delegates to process through Horizon, giving them practice with serving imaginary customers, and also making sure they used the stock and cash so they had a good practice at balancing. We were limited with what transactions we could actually process through the classroom Horizon kits as they weren't live so we were reliant on dummy cards etc. but could make up parcels etc to weigh and send. The duration of the classroom course could feel like it was not long enough if you had a full course and a very slow learner, which would mean a struggle to get everything covered as you can only work as fast as the slowest learner.

15. Considering POL00033612 my role as a Field Team Leader was to cascade the changes and improvements identified in the review to my team through Work Time Learning sessions. I think the pilot was to assess and review changes and standardisation of the training courses and materials and the results could be reviewed and then put into place. The purpose of the Performance Standard Assessment was to give the trainer a process to assess training needs and be able to identify and put in place actions for

areas where performance needed to be improved. This would all be documented.

16. Considering POL00032755 it is a tick list to ensure all the necessary procedures and processes have been completed and things are in place for a smooth opening of an office after a period of closure or if it has moved. I do not recall creating this document but it could have been put together from parts of other processes and lists that already existed. I have no recollection of receiving any feedback for this process.

### **Advice and Assistance**

17. When I left an onsite training or a classroom course I very rarely kept in any contact with the postmasters or the staff I had trained. In the early days I would leave my phone number in case they got stuck but this caused problems when I was working at the following post office so I encouraged them to use the Helpline. I did work on the counter at Priory Road Post Office in Wells on a couple of occasions to allow the postmaster to attend some appointments, following the support I gave when she took over the Post Office, as this was local to me, but I didn't offer very often as I was working and did not want to give up my free time.
18. I was not responsible for giving postmasters advice or assistance in my training role. My role was to teach them how to process transactions using the Horizon system, set up a tidy well organised system for working so that they didn't get in a muddle, and how to complete their daily and weekly accounts. I followed the training briefs and used the handouts and materials provided to help them remember what they were doing.

19. If issues were raised outside of transactional and training questions I would direct them to what I felt was the appropriate support, whether this was the Helpline, HR, or the Contracts Manager.
20. As this was so long ago I cannot recall any specific issues that were raised during that time. I do not recall any difficulties involving the Horizon system that were not an input error that could be corrected when identified.
21. I don't recall raising any concerns that needed a response.
22. I can only speak for myself and I felt, throughout my time as a trainer, I did the absolute best job I could helping and supporting my postmasters. I had a genuine feeling for them that I wanted them to be the best they could be, and I think I did a really good job.
23. I have no knowledge of POL00079768 as I've never seen this information before, but it seems to be calls logged to the Helpline from Priory Road Post Office. As I stated previously, I supported Gail Ward when she took over the post office, although she did not require much training as she was already experienced. I became a friend to her and her family and on a few occasions I worked in the Post Office to allow her some time away. It would only be a day or half day and never more than one at a time. I didn't do holiday relief or cover when I was training for any branches. I cannot say that I was the person taking the call listed at line 51. I have no idea what KB means in the last column.

### **Horizon Online**

24. With consideration to POL00039318 and POL00079768 when Horizon Online was being rolled out I think I was training so I would have been scheduled to support offices after they had migrated from manual to Horizon. I cannot

recall what support I delivered during that time but my name is on the document so I would have attended those branches and either was there for the migration to ensure everything went over to Horizon, or for the following morning. I do not have any clear recollection of these visits.

### **Bugs, errors and defects in the Horizon IT System**

25. I was not aware of any issues or problems with the Horizon system in my time with Post Office Ltd.

26. I never heard of any issues from anyone so there was no impact that I had to deal with.

27. As I had no knowledge of any problems with Horizon there was no impact or me to deal with.

### **Resolution of disputes**

28. When the training team and the audit team were amalgamated I received audit training which involved shadowing experienced auditors and being taught how to use the excel spreadsheets they used to record stock and cash during audits. I attended audits as part of a team of auditors, and when I was a Field Team Leader I also led audits with a team.

29. I was never involved or party to disputes between Post Office and postmasters as once an audit was completed, if there were any discrepancies, the Contracts Manager would be called to make a decision on what happened next. As an auditor I was never notified of any outcomes of audits or of what happened to postmasters with discrepancies.

30. Disputes and discrepancies would be resolved above my level. The only Contracts Manager I can recall from this period is Gary Adderley.

31. I was never aware of any contact or input by Fujitsu in any disputes.

32. As far as I was aware at the time I felt that the process for resolving discrepancies worked. It didn't cross my mind to look for improvements to a procedure that had been in place for some time and I understood to be working.

33. At the time I was working for Post Office and training postmasters how to use Horizon I had every faith that the system was working as it should and when errors occurred it was down to human error. As an auditor it was difficult to identify errors that had occurred in the past as the documentation was not always available and the systems reports did not go back far enough. I still did not question the integrity of the Horizon system, but since the information about the cases and the inquiry has been put in the public domain I do feel very sad for the postmasters and staff affected, and I feel Post Office should have been open when they discovered faults as it made everyone involved feel absolutely stupid and rotten through no fault of their own.

34. I have completed this statement without a solicitor and in my own words. I have done my best to recollect events but have found there to be areas where I cannot remember what I was doing and have not tried to imagine what I might have done.

**Statement of Truth**

I believe the content of this statement to be true.

Signed:

**GRO**

Dated: \_\_\_\_\_ 19 December 2022 \_\_\_\_\_

**Index to First Witness Statement of Rita Palmer**

<b>No.</b>	<b>URN</b>	<b>Document Description</b>	<b>Control Number</b>
1	POL00033420	Introduction to Post Office Essentials Guidance v2.5	POL-0030355
2	POL00033637	Draft training manual re: 1.3 Introduction to Post Office Local, v. 5.0	POL-003057 2
3	POL00085132	Training Review Guidance Notes	POL-0082190
4	POL00033632	Post Office Presentation V1.3 (January 2012) re: Training Review Cascade, by Sue Richardson on 12 January 2012.	POL-0030567
5	POL00033607	POL Training Q3 Review v1.2	POL-0030542
6	POL00033610	Audit Review Internal Stakeholder Feedback, Appendix A December 2011	POL-0030545
7	POL00033612	Review of Post Office Ltd New Entrant Training Pilot December 2011	POL-0030547

8	POL00032755	Relocation and Re-Opening of Agency Offices - FSA Guide, V7	POL-0029690
9	POL00079768	Call log from Priory Road PO	POL-0076331
10	POL00039318	PO Spreadsheet of Horizon Online Rollout data	POL-003580 0