

**Witness Name:** Brian Ware

**Statement No:** 1

**Ref:** WITN04880100

**Dated:** 27 February 2023

## **POST OFFICE HORIZON IT INQUIRY**

### **FIRST WITNESS STATEMENT OF BRIAN WARE**

1. I, Brian Ware, will say as follows:
2. Firstly, I would like to express my sympathy to everyone who has been affected by Horizon related issues.
3. I am now in my 70' s and due to the passage of time I have found it difficult to recall all of my time at the Post Office, but I have answered the questions to the best of my recollection.
4. To confirm why I am providing this statement, on 20 October 2022, I received a written request from the Post Office Horizon Inquiry for me to provide a written statement pursuant to Rule 9 of the Inquiry Rules 2006 – Request 1. This Request contained 6 questions which the Inquiry asked me to address in my statement. My answers to these questions are detailed below.

## **Background**

5. I have been asked to set out my professional background including any qualifications I have. I can confirm that I do not have any formal qualifications and I have not completed any external courses. My roles at the Post Office were vocational and therefore all of the training, skills and knowledge I have relate to the various job roles I had during my time at the Post Office.
6. I was also asked to provide a background of my work history, including all roles within the Post Office. Prior to joining the Post Office I had a range of jobs. I started off working in a factory in Tiverton as a stores clerk. I then worked at a nearby hotel called 'The Fisherman's Cot' in Bickleigh. I then went on to work as a production controller for a company which manufactured children's clothes. The company closed and so I moved to a structural steel company in Exeter, again as a production controller. The company went bankrupt and I was made redundant, leaving me unemployed for around 5 months and just doing casual work such as bar work.
7. I originally went for a job as a cleaner at the Post Office in the hope that it would get my foot in the door to enable me to climb the ranks. However, at my interview, the interviewer said that I could go for a job as a postman to give somebody early retirement and I accepted, beginning my career in the Post Office as a postman in 1982.
8. I was employed at the Post Office between 1982 and 2015 and the Post Office has recently provided me with a copy of my full career history at the Post Office as follows:

Role	Tenure
Postman	c. 1982-1985
Counter Clerk	c. 1985-1988
Postal Officer and Acting Branch Manager	c. 1988-1995
Management Horizon Program	c. 1995-1999
Horizon Field Support Officer	c. 1999-2001
Postal Officer	c. 2001
Branch Manager	c. 2001-2002
Postal Officer	c. 2002-2005
Project National Field Trainer	c. 2005-2006
Outlet Field Support Advisor	c. 2006-2010
Field Support Advisor	c. 2010
Audit/Training Field Support Advisor	c. 2011-2015

9. From 1982 to 1985 I worked as a Postman, originally in Crediton before transferring to Tiverton. An opportunity then came up to work on the counters and between 1985 to 1998 I worked as a Counter Clerk in the Tiverton branch office.
10. In 1998 I became a Postal Officer with an additional role of Acting Branch Manager as, whenever the manager was away, I would cover his position. This role was a promotion from Counter Clerk which was a more counter-focused role. At the time this role was known as a ' POA' – a Postal Officer with an allowance. I was very flexible in this role and although I was still based in Tiverton, I would travel to other offices to provide cover if they needed me, for example to Exeter or Crediton. During this time I reported to the branch manager who would in turn report to an Area Manager.

11. The timeline that the Post Office have provided me with says that between 1995 and 1999, my role was Management Horizon Program. I have found this confusing and I consider it may be an error because, to the best of my recollection, I was a POA and then went straight into being a Horizon Field Support Officer. I would have said that this was in around 1997 or 1998 and that I was in this role for around 3 years. However, this does not accord with the timeline that the Post Office provided me with which states that I was Horizon Field Support Officer from 1999 to 2001 with the role of Management Horizon Program before that.
12. I can recall that I applied for the role of Horizon Field Support Officer following an internal advert. I think there were around 60 Horizon Field Support Officers originally which increased over time to around 120 and we were all grouped into regional teams. I was based in Bristol and the original trial area was the Gloucester and Bristol area. There were 8 to 10 people in the team I worked in.
13. We would have various offices in the area and our role would be to drive to an office in the evening where a Post Master would be producing a paper balance of his account. We would then check his balancing and make sure that the stock and cash and other transactions were all listed properly. We had to achieve a balance on that night. Once we had a balance we then transferred the balance onto the Horizon system for the Post Master. This was very much a 'hand holding' role to provide support to the Post Master. By this time they would already have received initial training from another team on Horizon and the system would have been installed by Fujitsu. I was not part of the initial training of the Horizon system. My role was to provide

support at the branch or office and check that the Post Master had all his information correct and knew how to enter the information on the system.

14. We would give the Post Master 3 days' support – the first was the evening when we did the balance and two further days' support. It would depend on the office size as to how many people in the team would assist. For example, a very small office with one Post Master might only have 1 support officer, whereas a larger branch office might have 6 to 8 support officers in attendance.

15. Our responsibility was to make sure that the Post Master was able to put the transaction onto the system and make sure that transactions were done correctly. We would be looking over the Post Master's shoulder to make sure that they were not making a mistake but our primary role was to make sure that they were happy doing the transactions.

16. Although I was originally based in the Bristol area, once we had done the above with all the local branches and offices, I started to go out further afield to different areas for example, as far out as Kent and across to Wales and up to the Midlands.

17. Following this role I went back very briefly to being a Postal Officer (POA) in 2001 in Exmouth. Very soon after than I was promoted on a temporary basis to Branch Manager until 2002. This was not made into a permanent position and I was in the role for less than a year before going back to being a Postal Officer (POA) in 2002 to 2005. During this time I would often act up as manager when the manager was away.

18. After a few years in this role I was becoming a little frustrated at the lack of opportunities for promotion and I recall that I was speaking with a colleague who was a training officer in the South West and he asked me if I had ever considered training and following this conversation, I went for an interview and became a trainer between 2005 and 2010.
19. On the timeline the Post Office have provided me with, they refer to three job titles during this period: Project National Field Trainer; Outlet Field Support Advisor and Field Support Advisor. However, I recall these roles all being essentially one job of 'trainer' with no distinction between them apart from the title.
20. During my time as a trainer I would either do classroom or on-site training, providing training to new staff, from branch office staff to new Post Masters on all the systems and processes they would need to use at the Post Office location they would be working at. The classroom training was mostly in the branch office in Teignmouth which had a separate room with 6 training computers, although I occasionally went to London. The main part of my classroom based training role would be to train based on a set syllabus which would last 1 or 2 weeks depending on the course and range of services provided at the branch they would be working at. I was not involved in the training if we had a new product or service – that tended to be rolled out in a different way such as at a hotel where people from the Post Offices over approximately a 10 to 15 mile area would be invited to receive training.
21. As part of my own training to become a trainer, I cannot recall precisely but I think that I shadowed an experienced trainer for around 2 to 3 training

courses taking 1-2 weeks each. I was then observed delivering my first courses before gradually taking classes alone. There were usually 3 to 6 classroom training sessions a year. I would estimate that I delivered this classroom based training for around 8 to 10 weeks per year.

22. The rest of the time I would be on site in branches or offices to provide additional support to staff who had already received their classroom training, either from me or from another trainer. I would always go on site if there was a Post Master taking over from another Post Master and part of my role would be to watch them do a balance, check it and go through the balance with them and check they understood how to do it themselves and they were ready to take on the running of the Post Office. Following my support they could still have the option to contact Helpdesk or escalate specific problems which would be raised with the training team and we would then arrange to go back out.

23. In 2011 I became Audit / Training Field Support Advisor. I think that the Post Office were struggling to find enough auditors and so were getting trainers to do audits as well. Prior to this, the auditing sat separately to the training and I wasn't involved with it at all. The training for the audit role involved shadowing an experienced auditor and assisting them with their audits and gradually taking responsibility for more aspects of the audit. After that we would audit small offices alone and larger offices in as part a team lead by an experienced auditor. These audits were never announced but were spot check audits and they would last around 3 to 4 hours.

24. We would begin at 9am. We were checking cash, stock, remittances and various transactions at the branch – starting with the tills which were due to go live and start serving customers that morning and gradually working then through any other tills and main stock. We would also do a procedural audit to ensure that they had the proper procedures in place and were following best practice. For example, checking that they were asking the right questions to customers to check there were no hazardous or dangerous contents in the items they were posting.
25. The split in my role between auditing and training was about 50/50 and during this time I was part of a regional team and would travel around from the Scilly Isles up to Bristol. I reported to a team leader.
26. I was planning on retiring in 2015 and in November 2014 I took voluntary redundancy, officially retiring at the end of February 2015.
27. I have been asked to confirm what experience I had working in any IT roles. I can confirm that, from the introduction of Horizon, all of my roles would have involved working with IT. However, I have never worked in an IT department role.
28. The Inquiry also asked me about my experience of acting as a trainer. I have assumed that when they asked this, they were referring to my roles between 2005 and 2010, in which case please see paragraphs 18 to 23 above.
29. I have been asked about my experience using the Horizon IT system. When I was a POA and acting up as a branch manager between 2001 and 2005, my role would have included using the Horizon IT system. As a POA I would often be called to work on the counters during very busy times and would



again use the Horizon system. For example, at the end of the day Horizon would generate a list of the number of cheques we had received that day. I would use these figures to check that we held the correct amount of cheques before sending them off. Equally, it could be used to check the number of passports we had received and make sure that they had been uploaded correctly. I tended to view it as a glorified calculator which would give me a running total at the end of a day or week to check stock against.

30. I found Horizon relatively easy to use and do not remember having any problems with it. Occasionally there would be a situation where I would have to do a type of transaction I had not come across before and if that happened, I would either ask a colleague if they had already done it or would refer to the transaction manual which would give step by step instruction on what to do.

## **Training**

31. I've been asked to describe any training I had received towards being a trainer for the users of the Horizon IT system. I cannot remember what initial training I had before I became a Horizon Field Support Officer but I think I had training for around a week prior to starting the role.

32. The Post Masters' already had experience in transaction information and balancing before using Horizon and my field support role was to support them in using the Horizon system to record transactions and balancing.

33. I have described at paragraph 21 above the training I received in order to become a trainer from 2005 onwards.

34. I've been asked to explain the training I provided to people on the use of the Horizon IT system, including how I delivered that training and its content. My

role touched on training on two separate occasions in my career in the Post Office: the first was as a Horizon Field Support Officer where my role was not to train staff on how to use the system but to hold their hands and support them using the system in a live situation. As I have mentioned above, they had already received their initial training on the system prior to receiving this support. The second was when I was a trainer between 2005 and 2015 where I provided classroom and on-site training on all of the processes and procedures of the Post Office. This was not Horizon specific.

35. In terms of content of training, in my field support role, I do not recall specifically whether we had any guides or training reference material which we referred to whilst providing field support. In my training roles please see paragraphs 20-22 above. There was a very large training manual which we trained in accordance with, albeit as I have explained above, smaller branches which did not use all of the systems or offer all services would not have received training on every item within the manual, so people received training on the modules relevant to their branch or office, hence why the classroom based training varied in duration from 1-2 weeks.

36. I have been asked about how much time was spent on balancing. In my role as a trainer between 2005 and 2015, I would do two balances per week, as part of the overall classroom training on the Post Office systems. On the Wednesday in the week I would take them through a balance exercise together which involved stock, cash and transactions. We would then do the same thing on Friday before they went home. I allowed plenty of time to go through the balances slowly with them and they would often take around 2

and a half hours initially, but in general they would get quicker when they got used to the system and it would only take them around 1-1.5 hours.

37. When I visited branches on-site I would be there for around a week. Support with the balancing process took place on the Wednesday and whilst some work could be done through the day in order to get ready to balance, most of the work took place after the branch closed. It was part of my role to remain until they had achieved a balance.

38. I would remain on the site for as long as the Post Master needed assistance and can recall staying as late as 9pm after closing to assist. I would like to highlight that this balancing support was not specific to the Horizon system but as part of the general training as to how to do balancing.

39. I have been asked about how much time was spent on how to identify the cause of discrepancies in branch accounts. I can confirm that identifying and resolving discrepancies was part of the balancing exercise and as I have described above, I was required to stay until a balance had been achieved, and therefore I would spend as much time on identifying discrepancies as was required in order to achieve a balance. Discrepancies with certain transactions may not have been capable of being identified that day, for example if there had been a discrepancy in a Giro deposit, which would usually be resolved later by way of an error notice.

40. I have been asked to set out my recollection of any specific or general feedback I may have received from trainees on the training, and what was done with said feedback. However, as a field support officer, I do not recall

receiving either specific or general feedback on the training available on the Horizon system.

41. In respect of my classroom teaching I can recall that there were physical feedback forms and I would have received feedback as part of my yearly appraisal or review with my manager. However, I was not told by anybody and nor did I form the view, that the training programme was inadequate or that there were any fundamental problems with any of the systems I was training people on. In the main, feedback was positive and there was no overwhelming or consistent message being fed back to me that people weren't getting to grips with these systems and were having problems which might lead me to question that there were problems with the systems or the training.

42. In general, when I visited sites any issues which came up were specific, isolated issues. These were all the same types of issue which were common pre-Horizon and there was nothing to make me think that the system was not working. As far as I was aware most people were able to understand the systems relatively quickly and quickly and consistently were able to balance their accounts. Had people raised concerns which lead me to believe that there was an issue with the system I would have fed this back to senior management but I had no cause to do so.

43. I have been asked whether I was aware of any bugs, errors or defects in the Horizon IT system when I provided training. I can confirm that I was not aware of any bugs, errors or defects in the Horizon IT System when I provided training. I provided training in accordance with the training manual and I had

no reason to think that I needed to adapt the training to take into account any systems issues. I do not have an IT background and so I had no technical expertise which would enable me to understand an error caused by a computer system even if I had been alerted to a problem, which I had not.

44. I have been asked to confirm whether, with hindsight, I consider the training on the Horizon IT System to have been adequate to a.) enable a postmaster to use Horizon in running their branch, including balancing and b.) to enable a postmaster to identify the cause of apparent discrepancies in branch accounts. With hindsight I do consider that the training on the Horizon IT System was adequate. It was normal for individuals to have some queries or experience balancing issues as they got to grips with the system and its processes but that was anticipated and dealt with by the fact training was not entirely classroom based and we would visit branches to provide additional support. The overwhelming majority of Post Masters were able to balance and if they had ongoing problems they would have a route back to training or the Helpdesk which was open until 9pm on balancing night. If the Helpdesk was unable to resolve the issue it could be escalated to the training team. Balancing issues also occurred pre-Horizon and training was provided to cover how to balance and check if they weren't balancing correctly.

I believe the content of the statement to be true.

Signed: 

Dated: 27 February 2023