

# Postmaster support policy

## Postmaster training

Version 2.1 | Public | April 2025



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# 1 Overview

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## 1.1 Introduction

The relationship between postmasters and Post Office is vital to mutual success. Working in partnership with postmasters, we support them in serving our customers and communities.

This is one of ten postmaster support policies which provide a clear framework and define the standard for how Post Office supports and works in partnership with postmasters. Compliance with these policies also supports us in meeting business objectives and balancing the needs of our shareholder, employees, and other stakeholders. Details of all the postmaster support policies can be found in the 'Policy framework' section of this document.

The postmaster training policy is reviewed and updated annually, or more frequently as necessary. This ensures ongoing compliance with regulatory or legislative changes and to reflect any lessons learned from both internal and external events. It is subject to annual review and approval on behalf of the Audit, Risk and Compliance Committee (ARC). It is then adopted by Post Office Limited.

This policy is a non-contractual document provided for information. It does not form part of the contract between any postmaster<sup>1</sup> and Post Office<sup>2</sup>.

## 1.2 Purpose

The purpose of this policy is to set out the training standards relating to:

- (i) the initial onboarding of postmasters and their teams; and
- (ii) ongoing training where branches are identified as requiring additional operational support

## 1.3 Who must comply

Compliance with this policy is mandatory for all employees<sup>3</sup> working within or for Post Office Limited, including permanent and temporary colleagues (consultants, contractors, third party agents and their employees), who are involved in postmaster operational training activities on behalf of Post Office.

This policy also applies to postmasters, their branch teams and branch assistants in meeting the operational training requirements.

## 1.4 Strategic partners

Strategic partners have access to the same training materials as postmasters. Where further training needs are identified, strategic partners will use the same process to access and request further training.

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<sup>1</sup> In this policy, "postmaster" refers to a limited company, partnership, limited liability partnership, other entity or individual that contracts with Post Office for the operation of a Post Office branch.

<sup>2</sup> In this policy, "Post Office" and "Group" means Post Office Limited.

<sup>3</sup> In this policy "employee" and "staff" means all persons working for the Group, or on our behalf, in any capacity including employees at all levels, directors, agency workers, volunteers, interns, and contractors.

## 2 Principles and framework

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### 2.1 Core principles

Post Office will:

Maintain an effective governance and assurance environment including:

- Documented and approved processes for training postmasters and their branch teams/assistants.
- Ensuring all employees who are trained to deliver Post Office initial onboarding classroom and/or onsite operational training are accredited and quality assured to make sure training delivery is completed compliantly and competently. No other Post Office employees are authorised to deliver any element of the Post Office initial onboarding classroom and/or onsite postmaster operational training.
- Ensuring all new postmasters will receive training to introduce them to the basics of Post Office products and services available in their branches, using the Horizon system, and a variety of other key operational processes (including balancing). In-branch training will further embed the learning when new postmasters and branch team members start to complete live transactions for the first time.
- Rescheduling the full training package where a new postmaster's onboarding journey is delayed or postponed. This is to make sure training is timely and does not disadvantage the postmaster through knowledge/skill fade.
- Ensuring any relevant information from the classroom training is provided to the in-branch trainers to follow up
- Evaluating training feedback received from postmasters and taking the appropriate action where required.
- Having quality assurance self-assessment controls in place to make sure Post Office employees and processes are compliant with this policy.
- Providing annual refresher training on this policy for employees who are involved in postmaster operational training activities.

Foster an environment where postmasters and Post Office work in partnership to provide operational training in good faith with fairness, transparency, and professionalism. This includes, but is not limited to:

- Offering a variety of training opportunities to postmasters to meet their training needs, through classroom-based and/or distance learning and work guides.
- Offering comprehensive operational training to branch staff and making sure they feel confident when they conduct Post Office transactions and back-office processes using Horizon.
- Providing easy, online access to training material and the Postmaster Operational Training Guide. Full details of the training available can be found on Branch Hub.
- Ensuring the Operational Training Guide is up to date.
- Continuing to support postmasters and their staff to meet their training needs throughout the postmaster's contract.
- Considering on a case-by-case basis requests from new or existing postmasters to delay or forego some or all of the full training package.
- Where a business area identifies the postmaster may need support, they will raise a training request. The postmaster will then be contacted to discuss their training needs and the best way to provide the support required.
- Post Office will retain details of training offered and delivered at all branches.

## 2.2 Postmasters

- Are responsible for ensuring branches are operated in accordance with all applicable laws and regulations. To help postmasters remain compliant and protect their customers, Post Office will monitor and review regulatory changes to products and services, so we can provide regular compliance training to applicable branch staff.
- Are responsible for making sure their branch teams/assistants are suitably trained.
- Postmasters can request additional training for the branch team and branch assistants if it is required.
- Are responsible for making sure branch staff put their learning into practice after the initial onboarding training has taken place and are responsible for their branch staff's continuous learning cycle. Where a postmaster would like any further training, they can contact Post Office for support or can access the relevant training material online.
- Have access to the online operational training catalogue which details the training available to them.
- Many postmasters operate through limited companies or partnerships (and as individual postmasters may appoint managers to operate a branch on their behalf), any steps that need to be taken by a postmaster in relation to this policy can be taken by someone authorised to act on that postmaster's behalf (such as a director, partner, officer in charge or manager).
- Postmasters who aren't involved in the day to day running of the branch are responsible for ensuring the officer in charge/manager/nominee receives the full operational training package.

## 2.3 Policy framework

The postmaster support policies are reviewed annually and set out guidelines on how Post Office should support postmasters across ten specific areas. Each policy stands on its own, but should be reviewed in conjunction with the others.

Setting branches up for success

- Postmaster onboarding
- Postmaster training

We're listening...

- Postmaster complaint handling

Network monitoring, cash and stock management and account support

- Network monitoring
- Network operational support
- Network cash and stock management
- Network transaction corrections
- Postmaster account support
- Postmaster accounting dispute resolution

Our agreement with the postmaster

- Postmaster contract management

## 2.4 Additional policies

You can find the full set of postmaster support policies at:

<https://corporate.postoffice.co.uk/en/governance/post-office-policies/post-office-policies>

## 3 Where to go for help

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### 3.1 Postmaster wellbeing

Postmaster wellbeing matters to us. Branch Hub provides an online space where postmasters can find help and support when they need it. This could be to deal with an urgent or emerging situation, accessing professional resources, or getting friendly support and advice by joining a community group.

### 3.2 Reporting a concern – how to ‘Speak Up’

Post Office strives to foster an environment where everyone feels comfortable speaking up. We encourage everyone to raise concerns about wrongdoing, illegal activities, or unethical behaviour.

To support this, we have several reporting channels:

- The Speak Up reporter’s line manager.
- Contacting the Speak Up service, a confidential reporting service which is operated by an independent company on behalf of Post Office.
- Direct to the Speak Up Manager at [speakup@postoffice.co.uk](mailto:speakup@postoffice.co.uk)
- To a frontline team, e.g. area managers, the Branch Support Centre, and Grapevine.

#### Information and contact details

Speak Up:

- Telephone number: 0800 041 8159
- <http://speakup.postoffice.co.uk> which is a secure online web portal
- Email direct: [speakup@postoffice.co.uk](mailto:speakup@postoffice.co.uk)
- Through the QR code below.



### 3.3 National Federation of SubPostmasters

Postmasters may also contact the National Federation of SubPostmasters (NFSP) for help and support, by:

- calling its helpline on 01273 452324
- emailing [admin@nfsp.org.uk](mailto:admin@nfsp.org.uk)
- visiting its website [NFSP.org.uk](http://NFSP.org.uk)

### 3.4 Policy queries

If you have any queries about this policy, or any of the other postmaster support policies, you can email us at [postmastersupportpolicies@postoffice.co.uk](mailto:postmastersupportpolicies@postoffice.co.uk).

# 4 Document control

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## 4.1 Document control record

Version	Document review period	Policy – effective date
1.0	Annual	23 January 2025
2.0	Annual	25 March 2025
2.1	Annual	29 April 2025

## 4.2 Policy approval

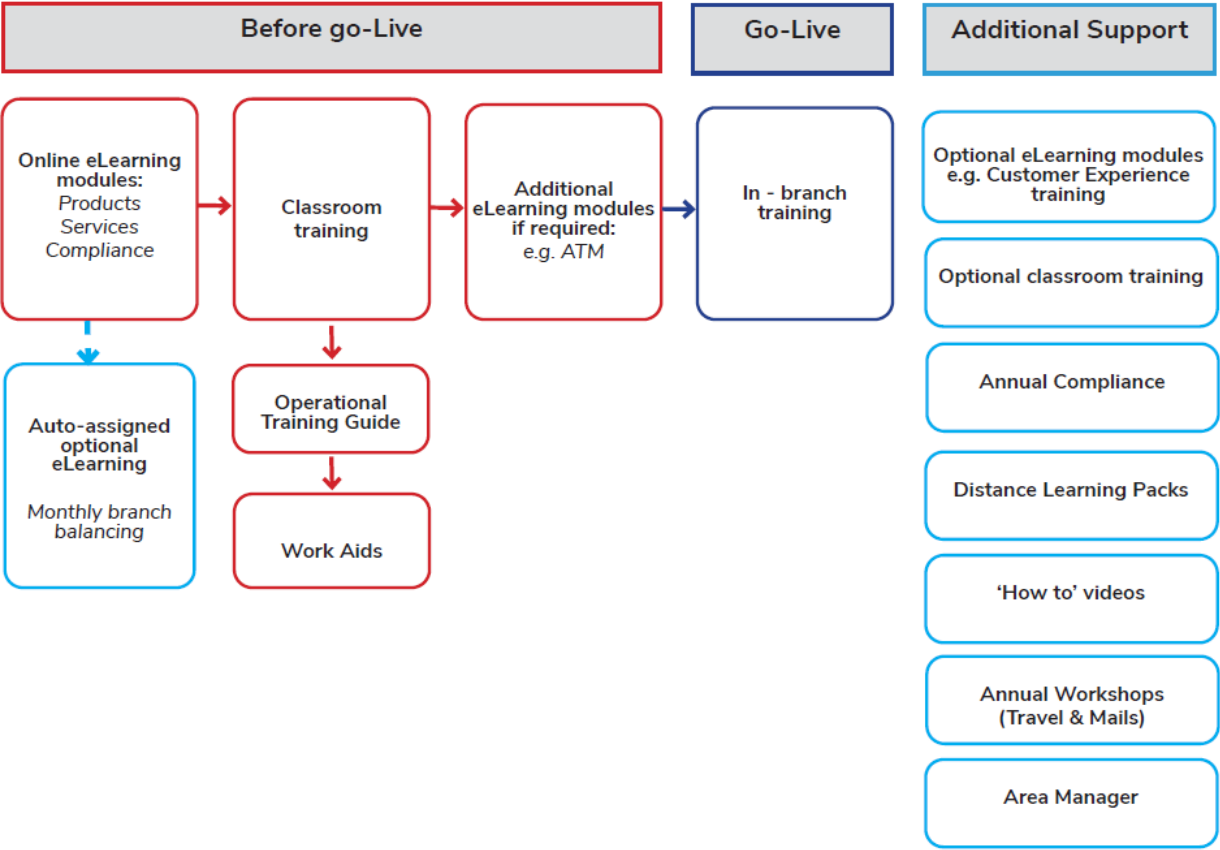
Committee	Date approved
POL ARC	25 March 2025

Next policy annual review date: 31 March 2026

# 5 Appendices

## Appendix 1 – Postmaster training journey

Training process for new postmasters and/or their assistants (as applicable):



## Appendix 2 – Definitions

**Audit, Risk and Compliance Committee** – is the Committee of the Post Office Limited Board which reviews and approves postmaster support policies.

**National Federation of SubPostmasters (NFSP)** – is a professional trade association which exists to support postmasters.

**Officer in charge/manager/nominee** – a person authorised by the postmaster to run the post office branch on their behalf.

**Strategic partner** – a corporate business that operates post offices in several locations within its retail estate. A strategic partner is likely to operate from more than 25 retail stores, has centralised support functions/head office management and has strategic alignment to future Post Office Limited propositions/network growth.

## Appendix 2 – Governance responsibilities

The policy sponsor is responsible for overseeing this policy and the policy owner is responsible for making sure the content is up-to-date and can be implemented. The owner will make sure it is implemented in practice and will inform the owners of other impacted policies where new or significant changes are made to it.

Once approved, the Audit, Risk and Compliance Committee is responsible for overseeing compliance with this policy.

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