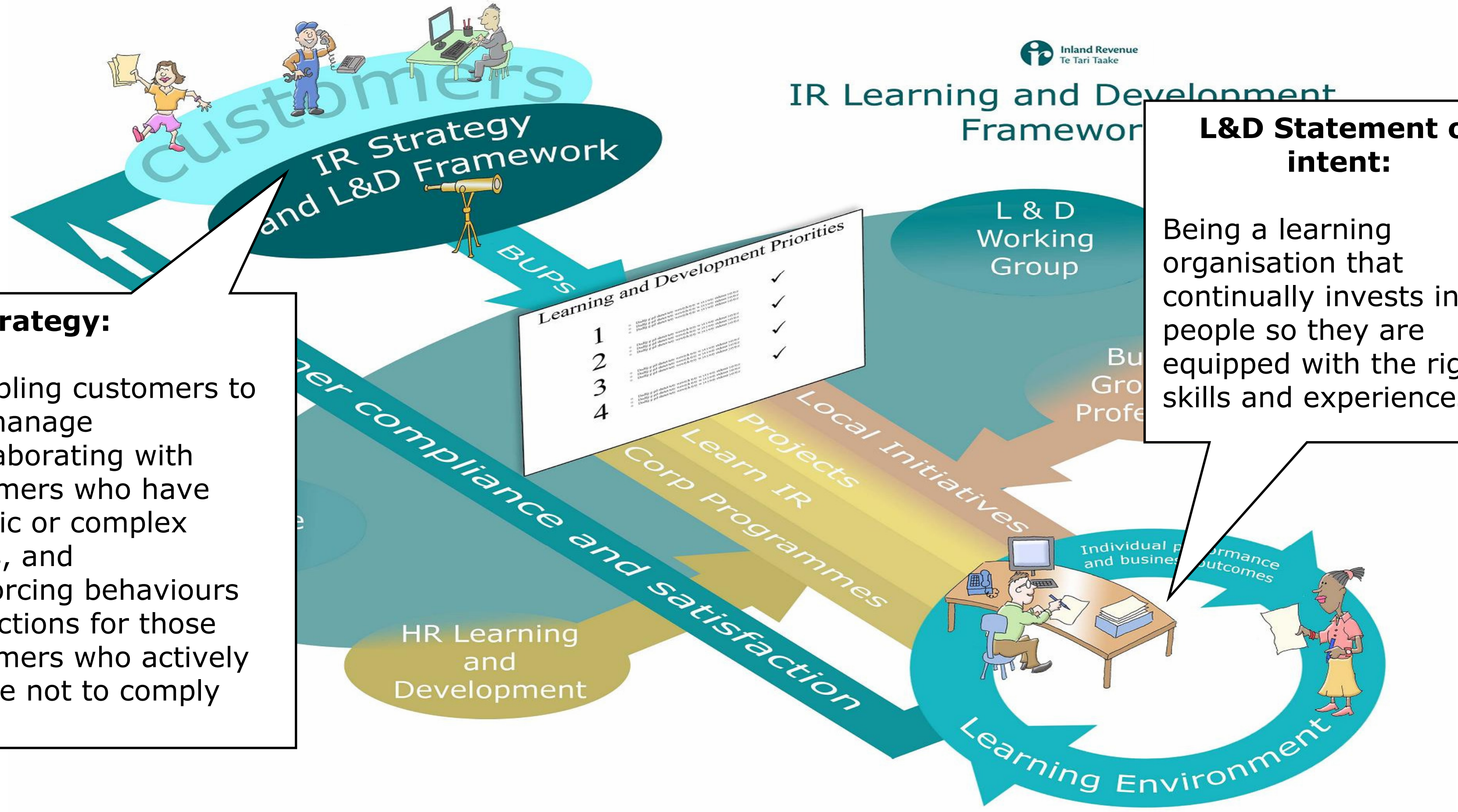
Inland Revenue
Te Tari Taake

SGATAR Joint Training Programme: Strategic Management of Tax Training:

New Zealand

Oct 2009

Strategic policy for staff training



IR Strategy:

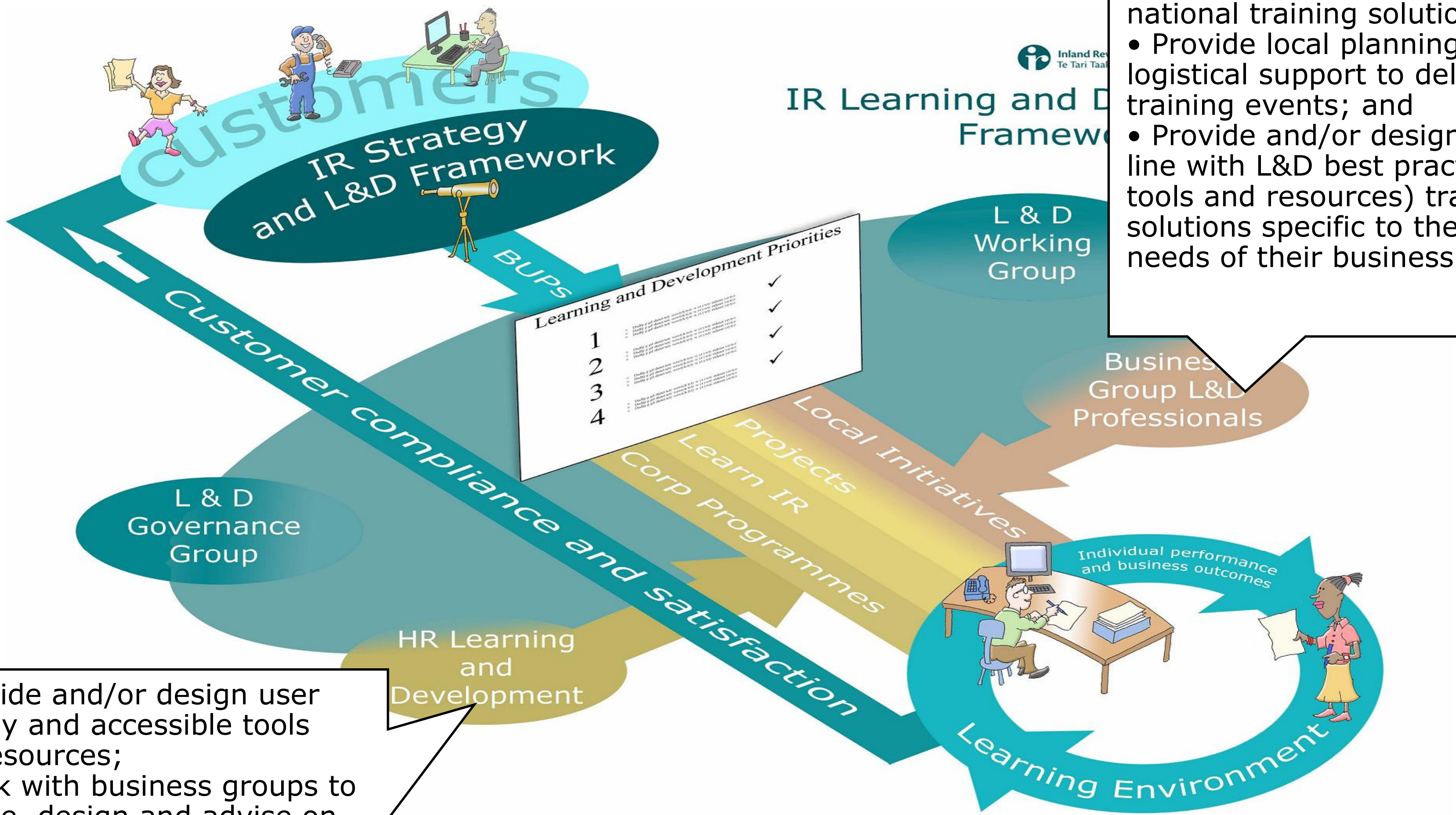
- enabling customers to self-manage
- collaborating with customers who have specific or complex needs, and
- enforcing behaviours and actions for those customers who actively choose not to comply

L&D Statement of intent:

Being a learning organisation that continually invests in our people so they are equipped with the right skills and experiences

Organisations responsibilities

- Provide trainers to deliver national training solutions;
- Provide local planning and logistical support to delivering training events; and
- Provide and/or design (in line with L&D best practice, tools and resources) training solutions specific to the unit needs of their business unit.



- Provide and/or design user friendly and accessible tools and resources;
- Work with business groups to provide, design and advise on effective job specific information; and
- Provide and/or design national training solutions (e.g. e-learning and/or classroom training).

Training of trainers

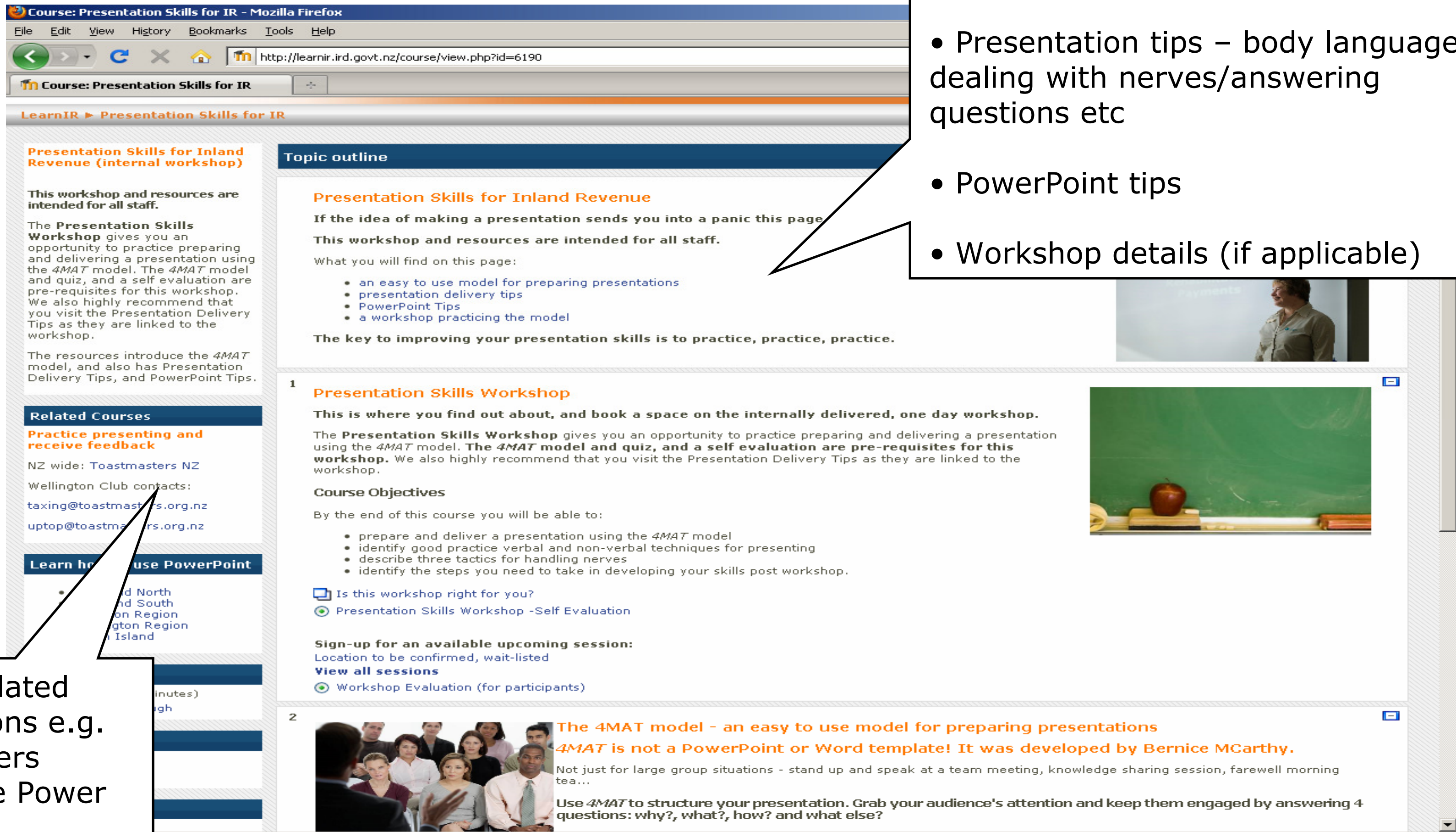
- Current approach:

1. Presentation skills resources and course
2. Train the trainer course
3. Generic facilitation guide
4. Co-train using subject matter experts and experienced trainers
5. Secondment opportunities

- Next steps

1. Building and supporting a trainer community

Presentation skills and resources

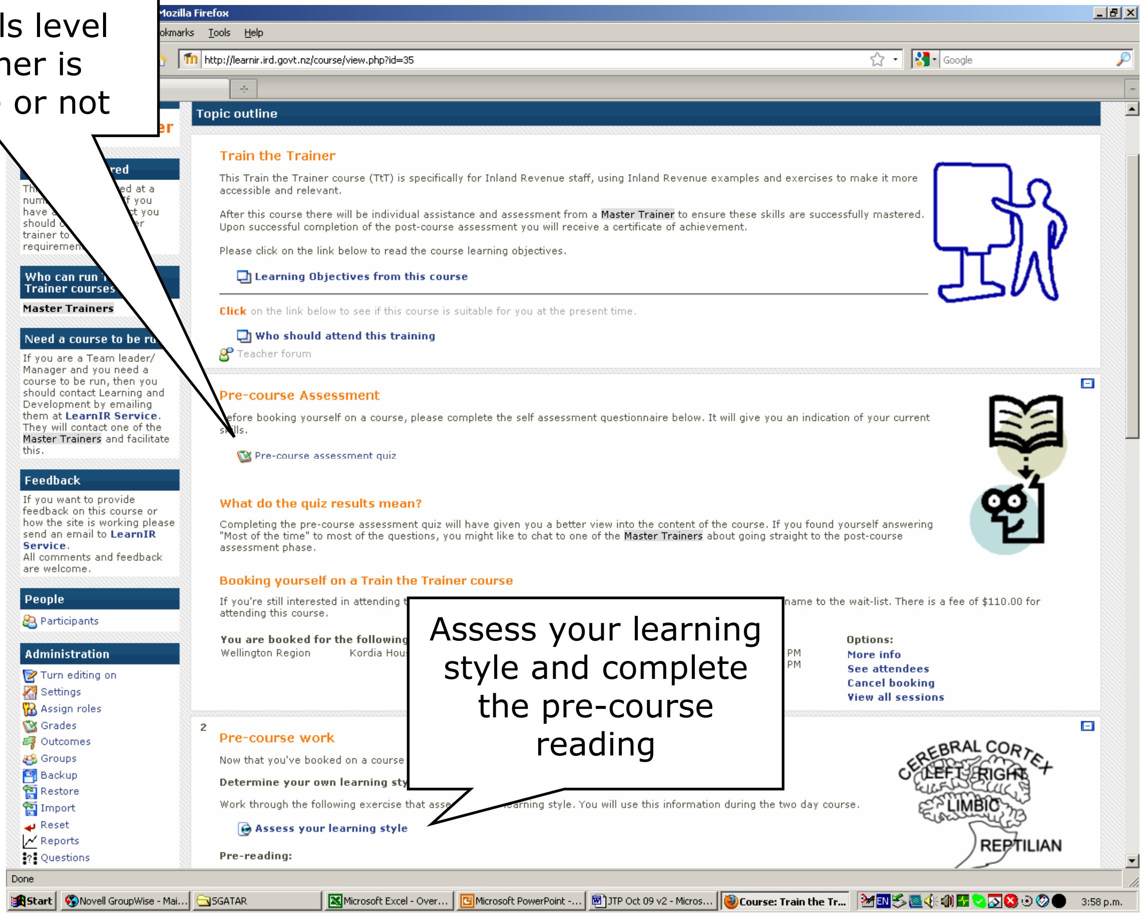


- Standard presentation model (4MAT)
- Presentation tips – body language/ dealing with nerves/answering questions etc
- PowerPoint tips
- Workshop details (if applicable)

Links to related solutions e.g.
Toastmasters
How to use Power Point

Train the trainer

Pre-course assessment – to give an indication of current skills level and whether is appropriate or not



Also access to additional resources
Join the Community

Assess your learning style and complete the pre-course reading

Generic facilitators guide

- Ideas for group exercises and activities
- Tips on energy levels
- Facilitators guide

Outlines the role of the manager re: pre and post course discussions

Outlines the role of the learner re: pre and post course preparation and discussions

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Use of IT/e-learning

1. Learning Management System (LMS)

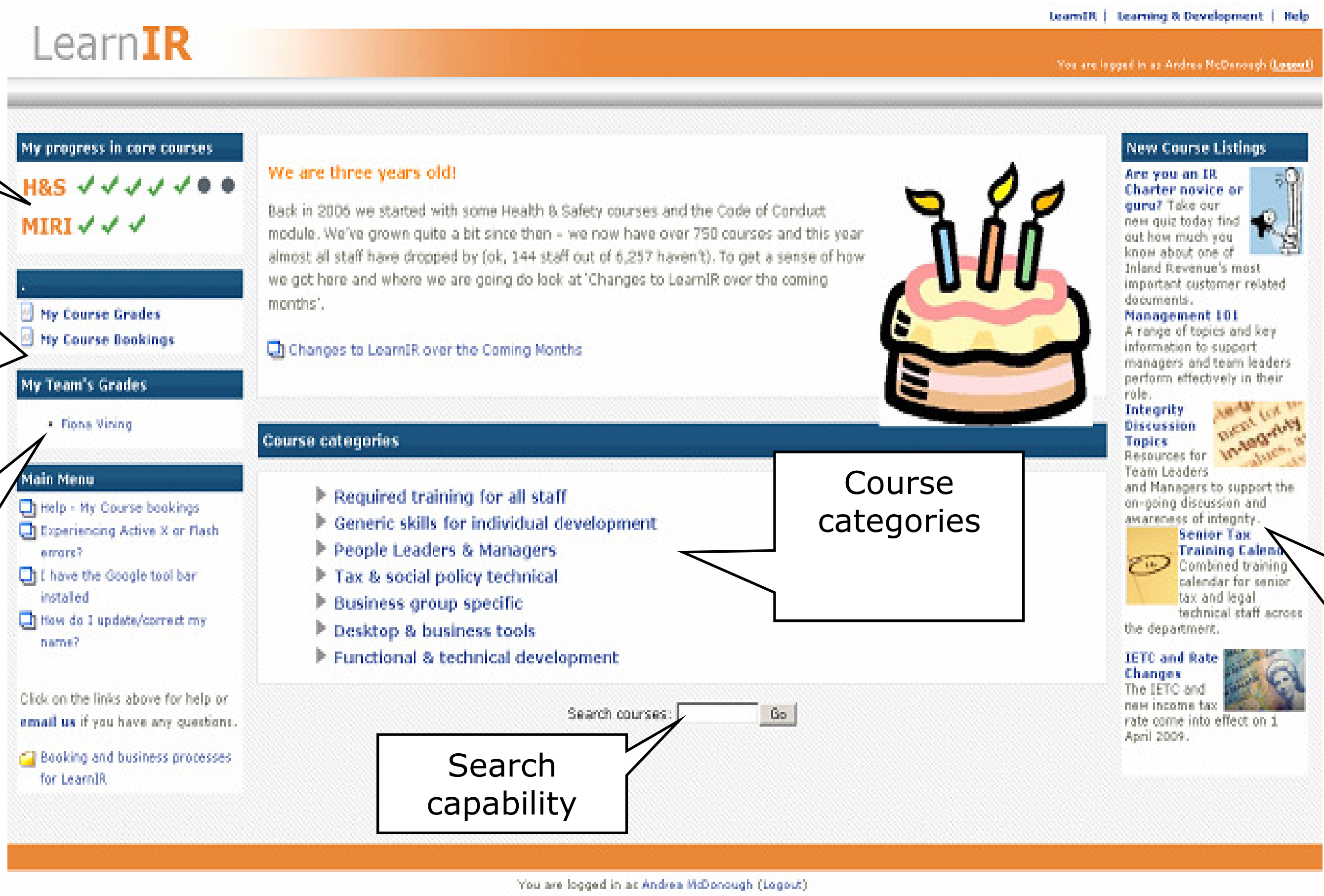
2. Examples of e-learning

LearnIR

Progress indicator on selected courses

Details of my personalised bookings and grades

My team member's grade

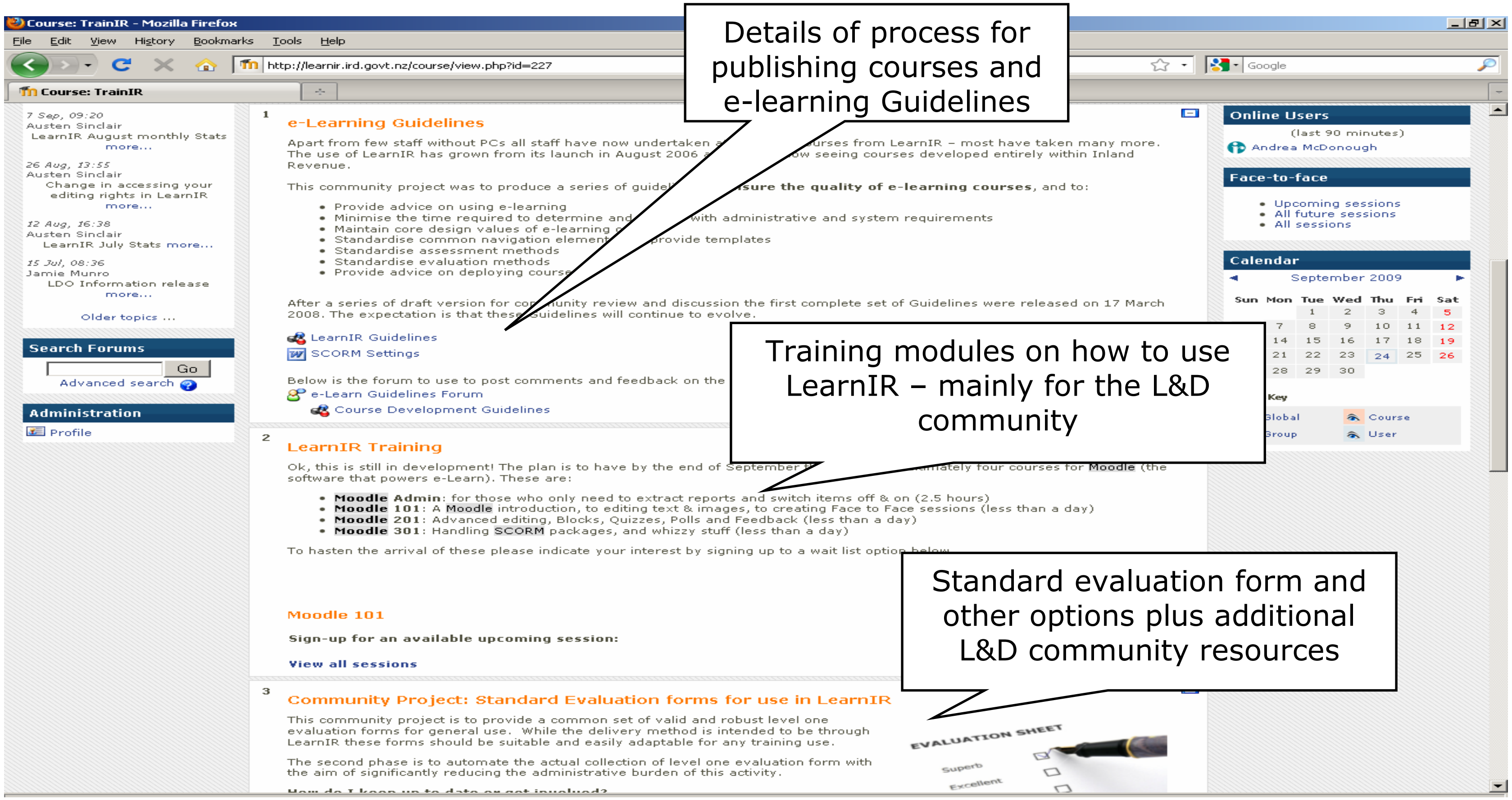


Course categories

Highlighted courses including Course Calendar

Search capability

LearnIR: e-learning standards



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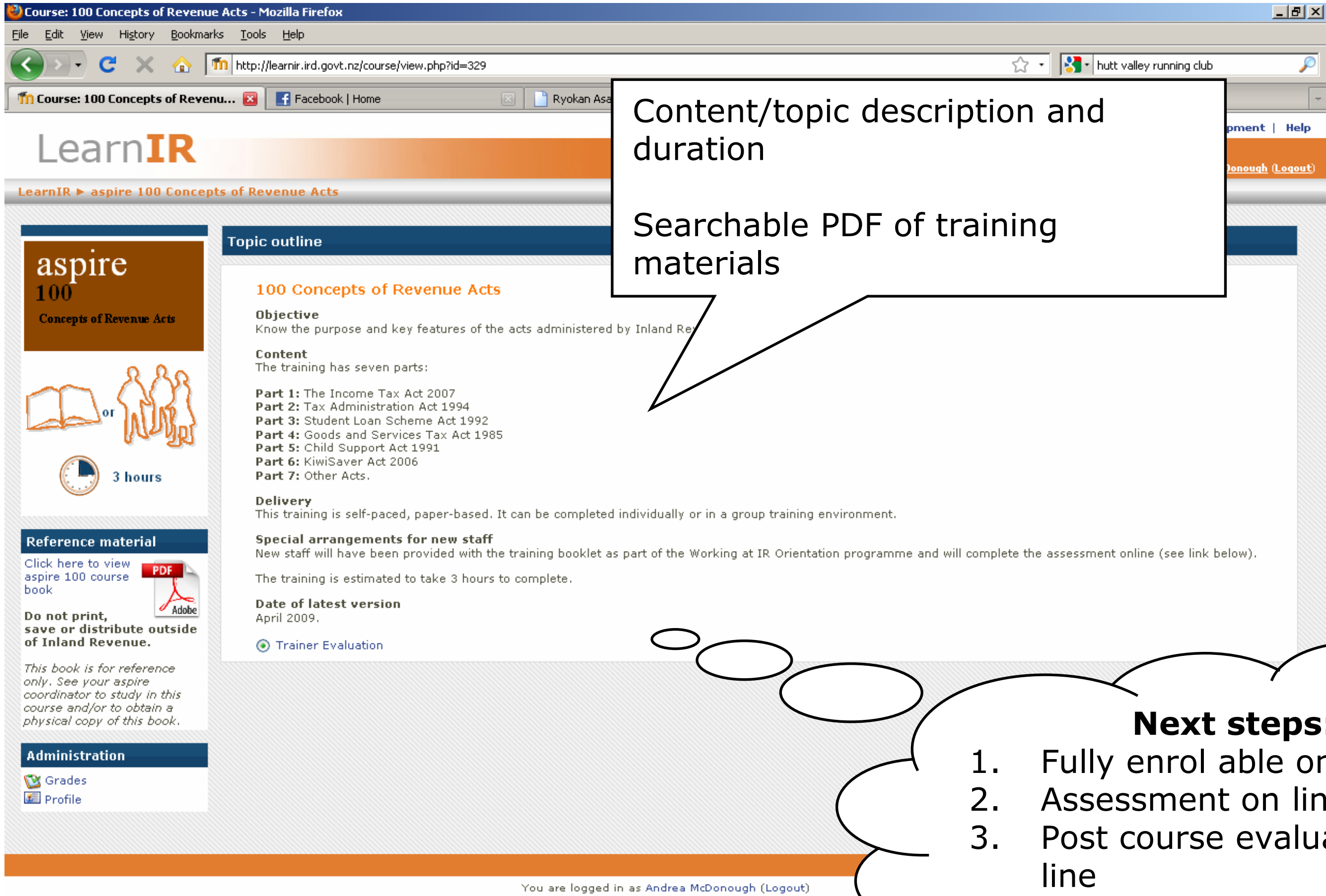
Aspire: Tax technical training on-line



Content/topic description and duration

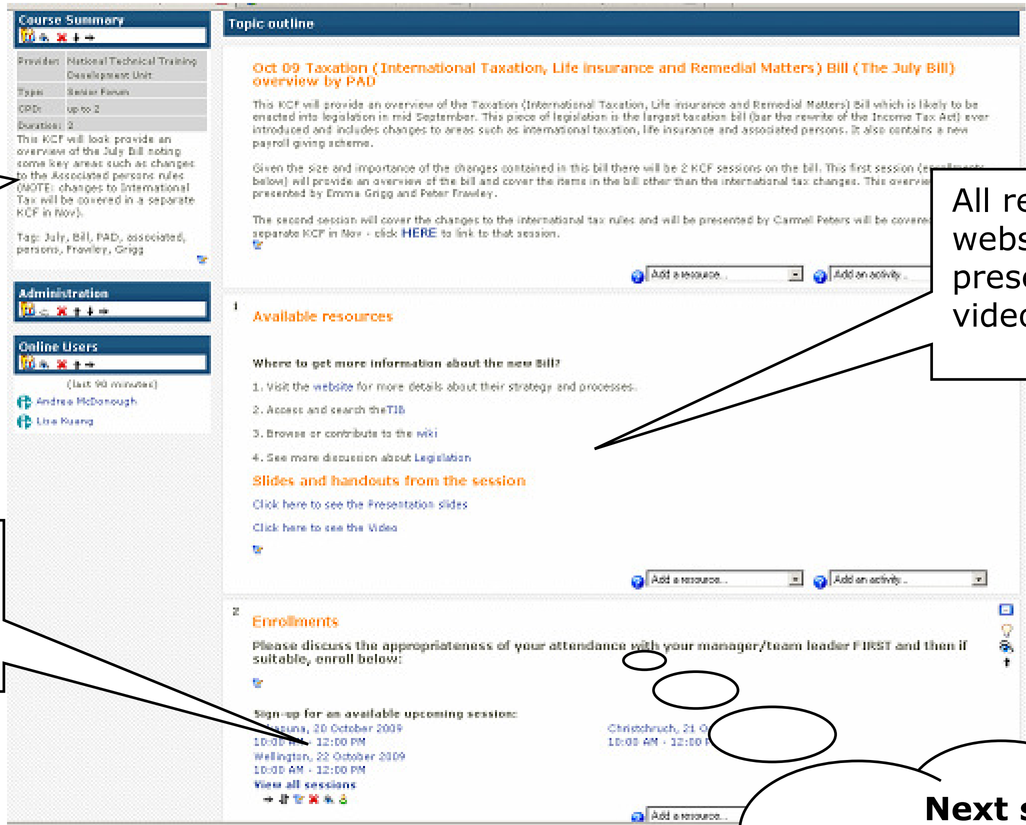
Searchable PDF of training materials

Next steps:

1. Fully enrol able on line
2. Assessment on line
3. Post course evaluation on line

Keeping Current Forums

Course provider, target audience, cost and duration (for CPD calculations)

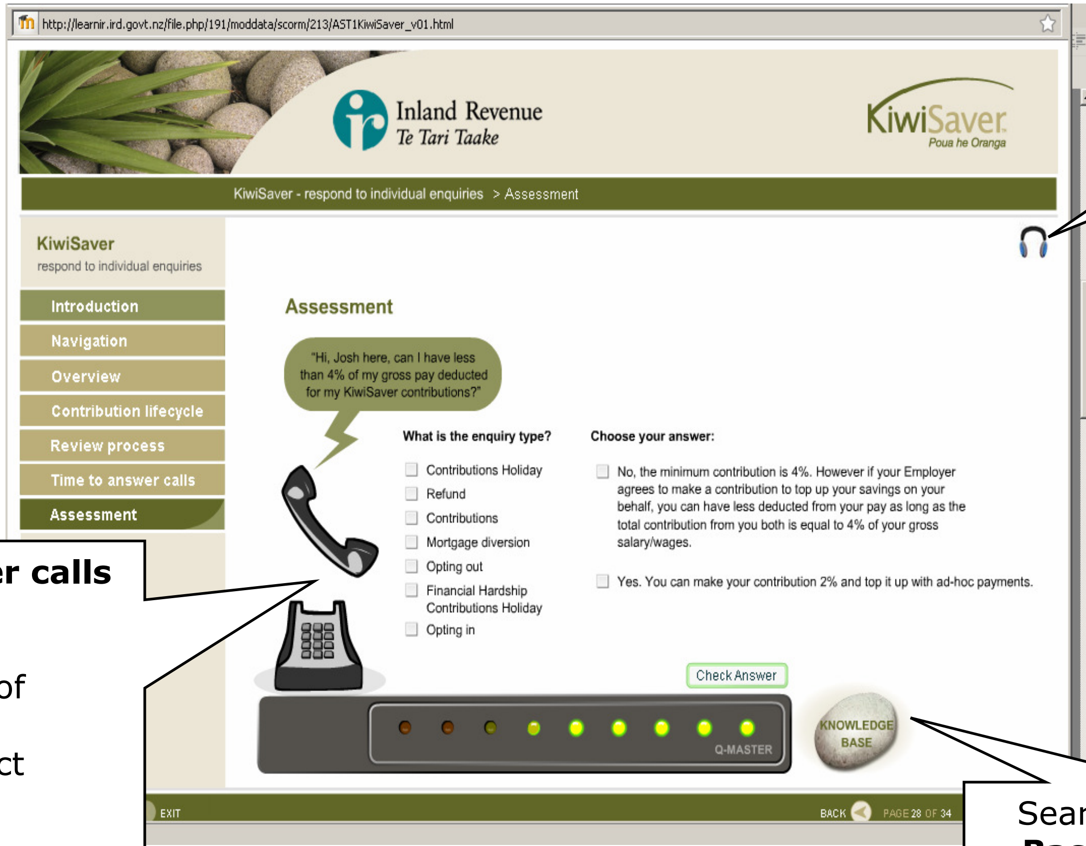


All related resources – websites, wikis, bulletins, presentation slides and videos (as applicable)

On line enrolment – automatically generated attendance lists and training history

Next steps:
Time flag/profiling to promote certain legislation changes once they apply rather than just as enactment

Social policy training on line



Audit assessment

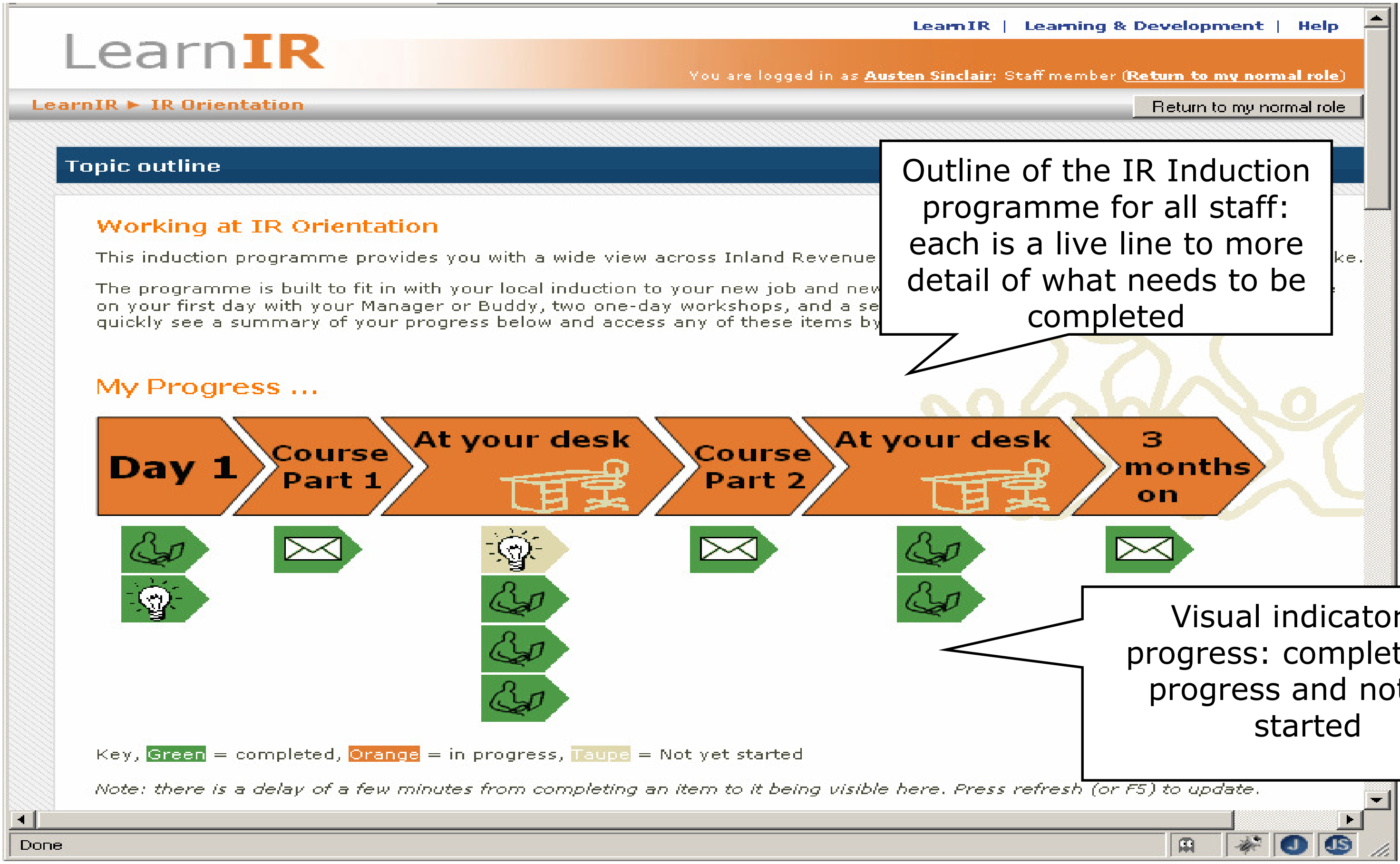
Scenario: Customer calls with query

1. Select the type of query
2. Select the correct response

(FLASH)

Search the **Knowledge Base** – live link to help learner get the answer correct and get familiar with using the Knowledge Base

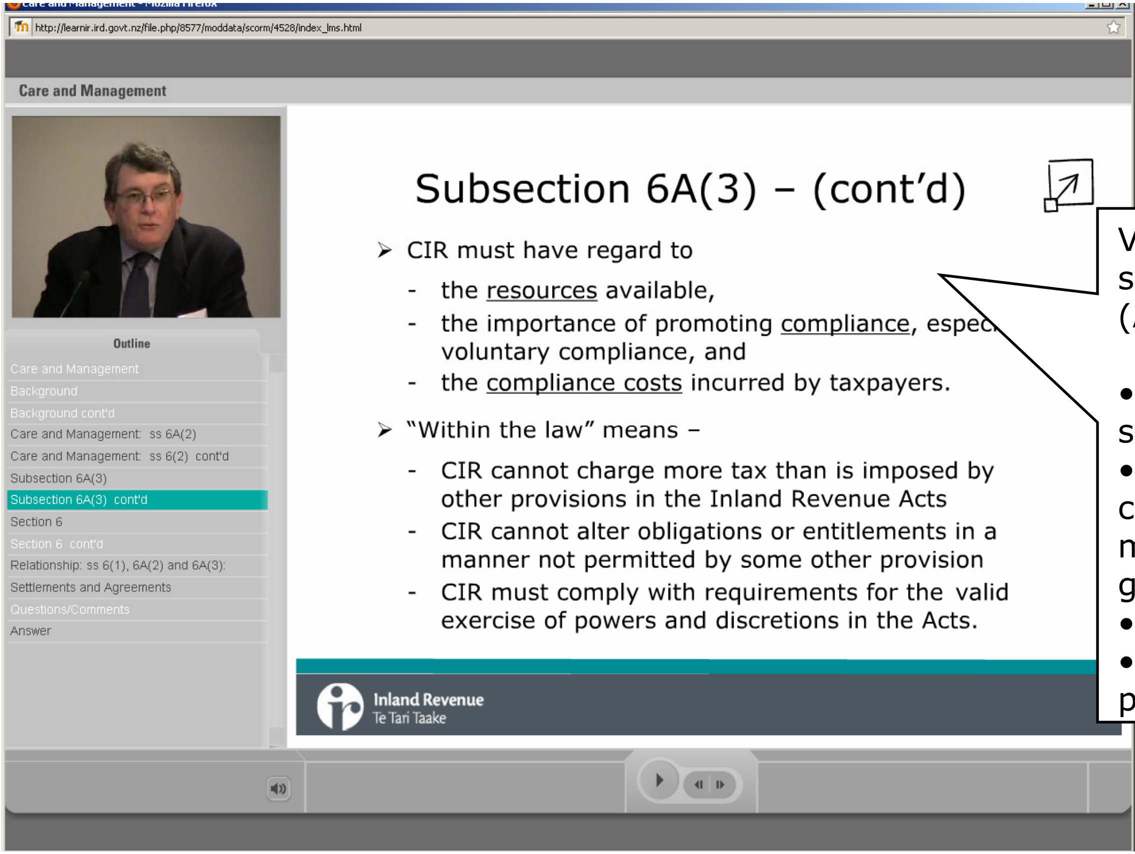
IR Induction on line



Outline of the IR Induction programme for all staff: each is a live line to more detail of what needs to be completed

Visual indicator of progress: completed, in progress and not yet started

Videos for technical content



Video recording synchronised with slides (Articulate) –

- allows for self-paced study
- distribution of key content/speakers messages across a wide geographical area
- consistency of message
- cheap and quick to produce

Webinars/Video Conference

- "Knowledge Cafe" technical knowledge sharing sessions via Video conference

- "WebEx" webinar software for remote office training e.g. CCH database training

Next steps:
Expect greater usage of this sort of technology in the future

Business challenges (part 1)

1. Business attitude towards training

2. Lack of user friendly information

Directional information & Resources: Management 101

Topic outline

Internal controls 101 for managers and team leaders

Organisations don't like surprises and IR is no exception. Internal controls are a series of checks and balances that the business unit has identified to manage the assessed risks. The business monitors these on a regular basis so the chance of surprises is reduced. Periodically Internal Controls carry out an internal audit to ensure that these checks and balances are being completed on a regular basis. This provides assurance to the business.

There are 5 components to the IR Internal Control Framework:

- **leadership and culture** - leaders need to lead by example
- **goals and objectives** - ensuring we can deliver what is expected of us
- **control activities** - which are included in business processes
- **information and communication** - the right information, for the right people, at the right time, to make the right decision
- **monitoring and improvement** - team leaders an
what is not working.

The booklet below is a 16 page document which gives you
is worth reading.

And at the bottom of this page are two scenarios for you to
with your manager.

Internal control framework booklet (88KB, 16 pages)

Internal controls glossary

Framework Glossary

1 **What you need to know about internal controls in your first month**

Become familiar with the National Control Framework for your business unit. There are links to some frameworks below
Framework is not listed there, talk to your reporting manager about where you might find it. PAD and OCTC do not h
more informal business management checks. If you want to look at other business units' control frameworks,
personal!

What you need to know in your first month and regularly

2 **Things you need to know about internal controls that happen on a regular basis**

- BMCs are completed regularly - either monthly, quarterly or six monthly
- Management checks are completed quarterly or six monthly
- Team leaders and managers get the opportunity to give feedback on whether the BMCs are working. In other words, are we measuring the things
the right assurance?

3 **Apply your knowledge**

Below are two scenarios for you to apply your knowle … our answers until you have
discussed them with your manager.

Internal controls scenarios

Test your knowledge

Next steps:
Better and more consistent access to searchable, easy to find on line resources for all tax areas

Business challenges (part 2)

3. Financial pressure

4. Maturity of L&D community

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The End