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EPFO


# TRAINING POLICY 2022



New Delhi

EMPLOYEES' PROVIDENT FUND ORGANISATION

MINISTRY OF LABOUR AND EMPLOYMENT



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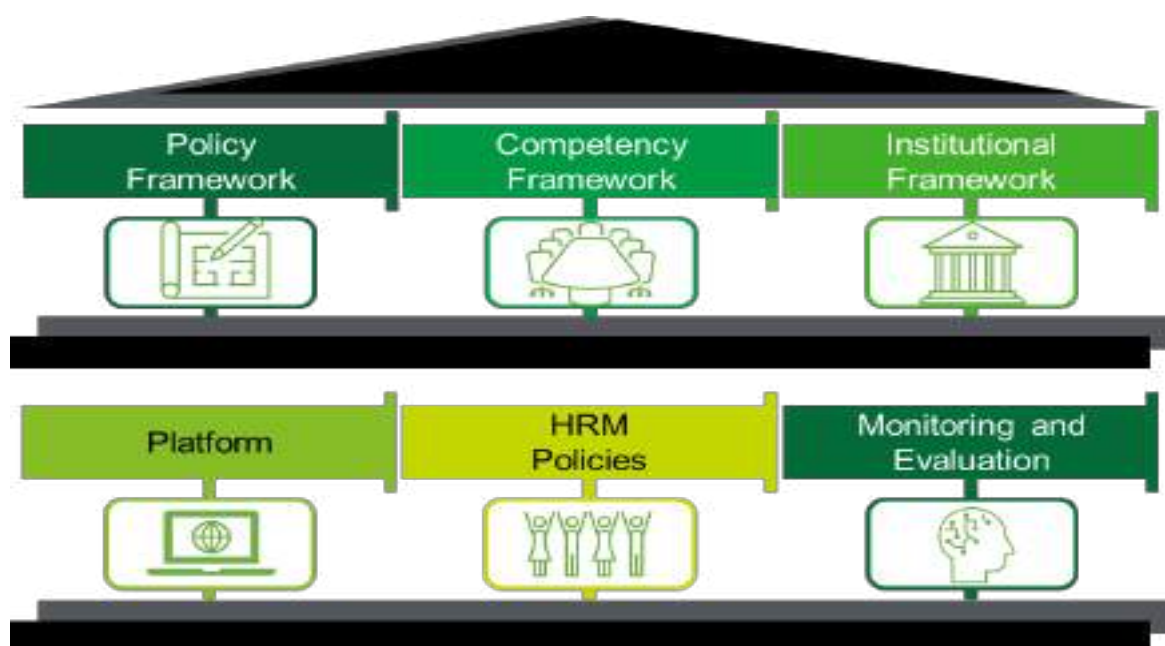
## Abbreviations

<b>Acronym</b>	<b>Description</b>
CPP	Career Progression Planning
DoPT	Department of Personnel and Training
DTS	Direct Trainer Skills
DoT	Design of Training
EOT	Evaluation of Training
eHRMS	Electronic Human Resource Management System
DFFT	Domestic Funding for Foreign Training
i-GoT	Integrated Government Online Training
ILO	International Labour Organization
ISSA	International Social Security Association
ICT	Information Communications and Technology
MOOCs	Massive Open Online Courses
NPCSCB	National Programme for Civil Services Capacity Building
NTP	National Training Policy
PDNASS	Pandit Deendayal Upadhyaya Academy of Social Security
ToT	Training of Trainers
TNA	Training Need Analysis

# Chapter 1: Background and Overview

## 1.1 Background

1.1.1 The Government of India, as part of its ongoing reform in public human resource management and governance, has launched the **National Programme for Civil Services Capacity Building (NPCSCB) – MISSION KARMAYOGI**, which aims to create a professional, well trained and future looking civil service that is imbued with a shared understanding of India’s developmental aspirations, national programs and priorities. The NPCSCB is built upon six key pillars, which are as follows:



1.1.2 The focus of NPCSCB is on promoting ease of living and ease of doing business, by considerably enhancing the citizen-government interface through creation of functional and behavioural competencies among the civil servants. The goal is to create an ecosystem of competency driven training and Human Resources (HR) management by transitioning from a ‘rules-based’ system to the ‘roles-based’ system.

1.1.3 The NPCSCB will cover all civil servants across ministries, departments, organisations and government agencies, which are required to align their capacity building plans on similar lines. Accordingly, the training policy of EPFO has been built, encompassing the above broad guidelines and pillars of the NPCSCB, and also drawing upon the National Training Policy (NTP-2012) of the Department of Personnel and Training (DoPT), as well as the recommendations of The Global Commission on The Future of Work, constituted by the ILO, which has specified a

Human Centred Agenda for the future of the work to strengthen the social contract by placing people and the work they do at the centre of economic and social policy and business practice.

1.1.4 EPFO in its endeavour to implement **Mission Karmayogi** in letter and spirit has reworked and formulated this training policy, also drawing upon the following:

## 1.2 Vision

1.2.1 An innovation driven social security organisation aiming to extend universal coverage and ensuring *Nirbadh* (seamless and uninterrupted) service delivery to its stakeholders through state-of-the-art technology.

## 1.3 Vision Document EPFO@2047

1.3.1 Vision for the next 25 years, to make EPFO staff ready and responsive to future changes and challenges as it gears to rise to the high standards expected on the centenary of the nation's independence. This will enable individual learners to follow self-decided as well as mandated learning paths, on the guidelines provided under **Mission Karmayogi**, in order fulfil their roles in EPFO in the best manner possible.

## 1.4 Mission

1.4.1 To meet the evolving needs of comprehensive social security in a transparent, contactless, faceless and in a paperless manner. To ensure '*Nirbadh*' services with multi-locational and auto-claim settlement process for disaster proofing EPFO.

1.4.2. To ensure ease of living for members and pensioners and ease of doing business for employers by leveraging government of India's technology platforms for reaching out to millions.

1.4.3. Building upon the six pillars enshrined in the **Mission Karmayogi** document and the above guiding principles, this training policy has also been framed factoring in the directives contained in the National Training Policy of 2012, seeking to put in place a training and mentorship plan as part of its policy framework, along with competency mapping, career progression planning, and development of in-house expertise, and capacity creation as per mandated number of man-days of training required, through strategic institutional tie-ups with knowledge partners, self-learning pathways and additional capacity generation. Real time performance monitoring and continuous feedback will further inform policy change and alignment to organizational objective.

1.4.4. To achieve the above aspirational standards, it is imperative that the workforce of EPFO, cutting across hierarchies and locations, is functionally competent, skilled in discharging its duties, and sensitive towards its clientele and other stakeholders. It is required, in essence, to embody the Prime Minister's vision of an ideal civil servant who is tech-enabled and professional, while also being creative, proactive and polite, among other qualities. It aims to continuously and progressively develop employee skills, knowledge, and competencies to support the current and future objectives of EPFO, in its quest to become a world class organization.

*Figure 1: Qualities required in EPFO official based on PM's idea of an Ideal Civil Servant*



1.4.5. In addition to the above, a Training Needs Analysis (TNA) has been done for the organization including discussions with all stakeholders, and the policy has been framed based on the inputs after clearly defining its aim, scope and objectives as under:



## **1.5 Aim**

- 1.5.1 Develop the officers and staff of EPFO into a competent, responsive and future-ready cadre committed to fulfil the vision and mission of EPFO as world class Social Security organization.

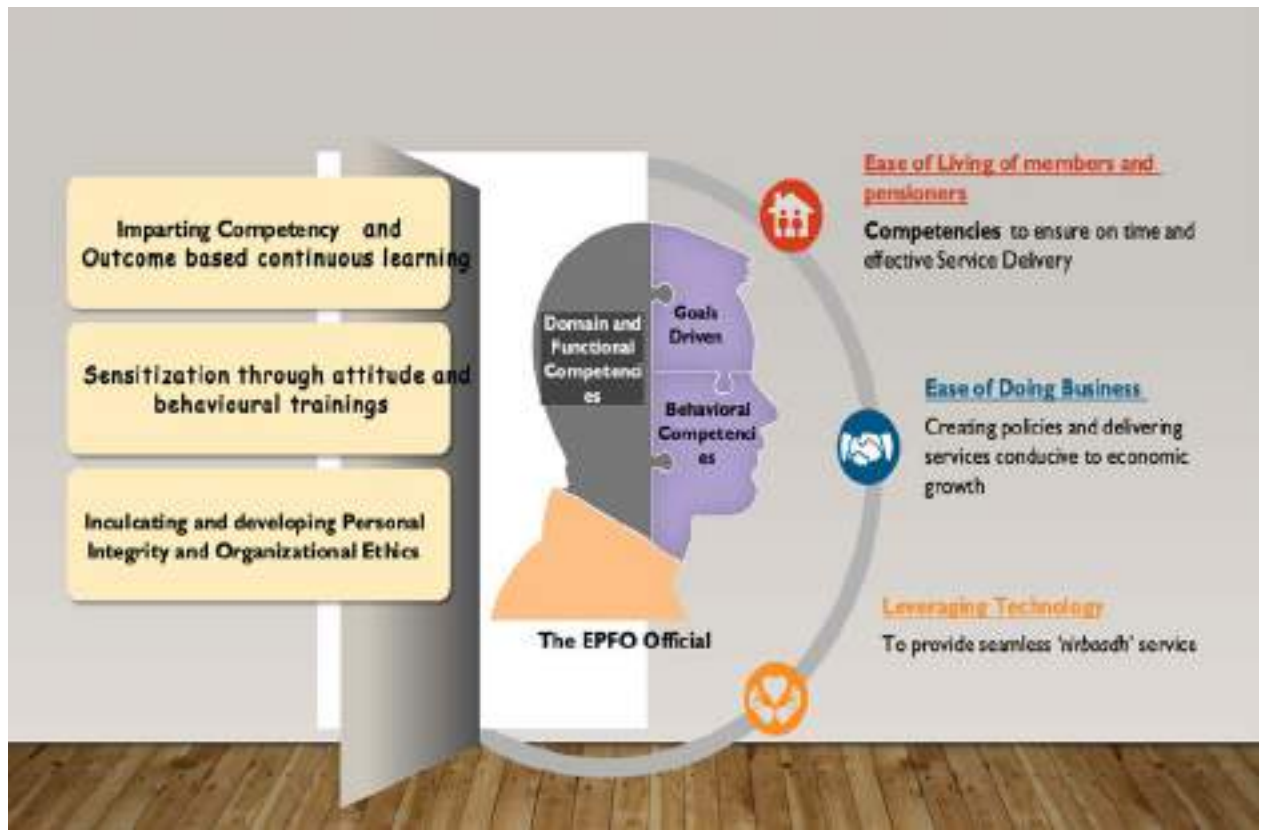
## **1.6 Scope**

- 1.6.1 This policy applies to all permanent, full-time officers and staff members of EPFO and officials on deputation from other departments. Also included within its scope, as part of its outreach program, are its clientele of members and pensioners, and stakeholders like employers, board members and representative bodies. This policy does not presently cover employees serving on contract basis, employees engaged through contractors, other contractors or consultants.

## **1.7 Objectives**

- 1.7.1 To enhance the attitude, knowledge and skill levels of EPFO employees by providing them competency and outcome based continuous learning interventions, in order to enable them to create such service standards, leveraging technology, which will ensure the greatest ease of living for all members and pensioners.
- 1.7.2 To sensitize EPFO employees towards organizational goals and aspirations of its various stakeholders, through attitude and behavioural trainings, to enable ease of doing business.
- 1.7.3 To Inculcate the highest levels of Integrity and organizational ethics in EPFO employees, at both personal and professional levels to enhance the image of EPFO and enable the organization to fulfil its mission and mandate to emerge as a world class social security organization.
- 1.7.4 The objectives are sought to be linked to the desired organizational outcomes through training interventions, as depicted in the following pictogram.

Figure 2: Linking of Organizational objectives with outcomes through training interventions (based on Mission Karmayogi )



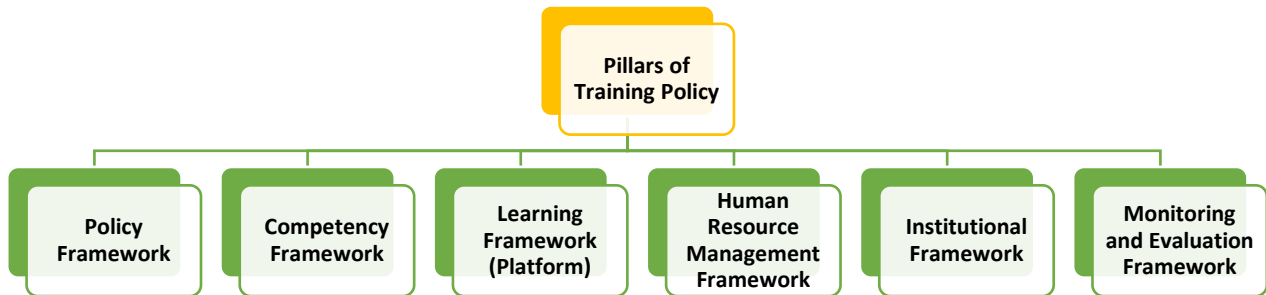
1.7.5 Each EPFO official is thus required to be equipped with necessary and need-based training interventions, attitude and behavioural changes and also sensitized to organizational and personal ethics. This will enhance his/her behavioural, domain and functional competencies, so as to fulfil the organizational vision of ensuring ease of living for members and pensioners and ease of doing business, leveraging technology to provide seamless 'Nirbadh' service delivery.

## 1.8 Salient Features

- 1.8.1 The training policy for EPFO provides for Profiling, Competencies Mapping, and Career Progression Planning (CPP) of all new recruits. It seeks to enhance job satisfaction so as to motivate employees and facilitate career progression to enable all EPFO employees to contribute positively to the organization by continually updating their competencies.
- 1.8.2. Training is envisaged to be learner centric and flexible by design, with co-planning of learning needs based on data inputs to be incorporated into development of personalized learning plans, informed through continuous feedback and assessment. There will be alignment of individual training needs with organisational requirements.
- 1.8.3. Behavioural competencies will be given prominence and priority in addition to domain and functional competencies, with particular reference to the following areas:
  - Gender sensitivity and inclusivity
  - Emotional intelligence
  - Negotiation, collaborative working and effective communication
- 1.8.4. Focus will be on development of managerial abilities and higher order thinking skills in the workforce in order to make them future-ready and adaptive to change.
- 1.8.5. The organization will look into fostering and development of institutional linkages, through PDNASS, with institutes of national importance as well as globally, and developing a strong working relationship with international bodies like International Social Security Association (ISSA) and International Labour Organisation (ILO).

## Chapter 2: Pillars of the Training Policy

This training policy has been built upon the six pillars enshrined in the Mission *Karmayogi* document, which are as follows:



### 2.1 Policy Framework

The Policy Framework lays out broad policy principles governing the training policy. The key principles of the policy framework for EPFO are as follows:

#### 2.1.1 Putting in Place a Training and Mentorship Program

2.1.1.1. EPFO will design a comprehensive and progressive series of trainings, in-house and in collaboration with knowledge partners and other identified institutions, to cater to the training requirements of officers and staff. It will enter into tie-ups with premier institutes to enable certifications, on completion of successive levels on the training continuum. In keeping with the core competence of EPFO, successful completion of trainings would lead to post graduate recognized certifications in Social Security.

2.1.1.2. Further, a comprehensive mentorship policy will be designed and implemented to help new appointees find experienced guides or mentors to handhold them while learning on-the-job and help them navigate workplace relationships and culture with ease. A formal mentoring policy will not only help in defining roles and expectations, while but also lay down a framework for informal mentoring work to be rewarded and recognized, and enable succession planning, passing down of experience, and creating a second rung of learned expertise within the organization. The proposed mentorship policy is annexed to this document as **Annexure 1**.

## **2.1.2. Developing a Framework for Creating In-House Expertise**

2.1.2.1. This policy document envisages EPFO as a world class organization, positioned as a global knowledge leader, consultant and service provider in the social security domain. Towards this end, a framework for developing in-house expertise in social security and related subjects, namely finance, investments, legal, ICT etc., by tie-ups with professional training bodies will be developed.

2.1.2.2. Based on profiling of new recruits, and in accordance with the detailed career progression planning performed, after giving due exposure in all functional areas, identification of suitable avenues of specialization will be done, and officers groomed along the shortlisted career paths by providing training, exposure and postings of progressively greater responsibility. In this way, a core team will be built with specialization to manage investments in-house and developing capacity to provide social security consultancy to other players. A detailed program proposal on building expertise is attached at **Annexure 3**.

## **2.1.3 Providing Specialized High-End Training for Top Leadership**

2.1.3.1. The top leadership of the organization consists of senior positions, of ACC upwards, namely, CPFC, FA&CAO, CVO, all ACCs. All these positions require training inputs in leadership and highly specialized roles in order to perform optimally and represent the organization at various national and international fora. As it is not possible or feasible for PDNASS to provide individual and tailor-made training to this cadre, training tie-ups will be made with premium national and international institutions, and top management officials sponsored to attend top-notch training programs, seminars and workshops to sharpen their domain expertise and global acumen.

## **2.1.4. Developing Programmes for Capacity Building of Trainers**

2.1.4.1 The mainstay of any good training policy is the quality of its trainers. Training of Trainer (ToT) is thus not only important but vital for success of any and all training interventions. Equipping the trainers in the training institutes, namely PDNASS and ZTIs, with the right skills, acumen and outlook, will be an important component of this policy document, and the detailed proposal is placed as Annexure 2 of this report.

Figure 3: Training of Trainers



### 2.1.5 Putting in Place World-Class Outreach Programmes for Stakeholders like Subscribers, Employers, Board Members etc

2.1.5.1 The EPFO does not function in isolation. It is connected through dynamic linkages with its subscribers, pensioners, employers, board members, employer and employee representative bodies and other players, all of whom form the ecosystem of its stakeholders, and whose interests and requirements it has to take care of, including training needs. Policy decisions which impact the stakeholders and clients need to be communicated, new employers need to be on boarded, and information needs to be disseminated from time to time regarding new initiatives and procedural changes. For this, outreach programs will be organized on the regular basis.

2.1.5.2 The members of Central Board of Trustees shall also be oriented at least on two occasions during their official tenure, preferably during their first year of nomination as a Board member, and mid-term. These Board members shall be exposed to training on basic principles of Social Security, Public Policy, Democratic Governance and Principles of Pension Fund management.

## 2.2 Competency Framework

### 2.2.1 Competency Profiling and Mapping

2.2.1.1 Competency profiling is an important function of HR policy which helps an organization identify right persons for the envisaged roles within an organization and map their competencies to organizational roles.

Figure 4: Competency Profiling and Mapping



2.2.1.2. Competency mapping assists employees in their long-term career progression planning. Recognizing and developing the unique strengths each officer brings to the organization and utilizing the inputs to help the officer grow in his/her career with proper learning and development inputs, can add much value to the organization.

Figure 5: Career Progression Planning



## 2.2.2. Training Need Analysis (TNA) and Effective Training Interventions

2.2.2.1. There are three levels at which of training needs assessment is required to be done:

Organizational, Occupational and Individual assessment. In Organizational assessment, the skills, knowledge, and abilities EPFO needs to meet its strategic objectives will be examined, and whether the right staffing is in place for meeting these objectives. Occupational or task assessment, looks at the specific tasks, skills knowledge, and abilities required to do jobs within EPFO, and individual assessment looks at the performance of an individual employee and determines what training should be accomplished for that individual.



Figure 6: TNA at Organizational, Occupational and Individual levels



2.2.2.2 Identification of competency gaps at each level and for each official between the competency required and existing is required to be done. TNA analysis is being carried out by the Capacity Building Commission of India for the organization as a whole. However, it will be a continuous process. Bridging of the competency gaps will be done through provision of role based modular training interventions, focussing on both behavioural and functional aspects.

### 2.2.3. Third Party Certifications

2.2.3.1. Trainings will be designed in such a manner that that they are sequential, providing incremental levels of skill development, and lead to certifications from recognized third party institutions and professional bodies. Competencies certified through third-party diplomas and degrees will enable learners to equip themselves with qualifications enabling them to function better, as well as compete with the best in the market, globally. Tie-up with professional bodies in the social security and allied fields will be developed, to lead to qualifications in the main domain area.

## 2.3 Learning Framework (Platform)

2.3.1. The Government Platform IGOT *Karmayogi* will be used as far as Possible and Feasible

2.3.1.1. Once it becomes functional, the iGOT platform will be made use of for enabling anytime-anyplace-any device learning. Facilitation and encouragement of guided self-learning will be enabled and sponsored through licencing, sourcing and curating relevant high-quality content and course certification on the iGOT platform. Content will be curated in-house as well as by engaging professional agencies and vetted knowledge partners from top ranking institutions and universities. The content so curated will be subjected to stringent quality control checks and updated from time to time.

2.3.1.2. EPFO may also look at strategic tie-ups with other international and national learning platforms in order to develop, curate and provide the best possible content to the trainees. Eventually, it may like to move towards its own world class independent learning platform once it develops in-house expertise. It may also look forward to building of online expert systems and content on the platforms as a ready-referral tool.

## 2.4 Human Resource Management Framework

HRM's role in training and development includes providing a framework of orientation, evaluation of performance, assigning training, and improving organizational outcomes through the right training interventions. HRM policies at organizational level need to be aligned to changes envisaged at policy level and ensure effective implementation of the approved training interventions. Right from recruitment of new incumbents, through their career progression planning, HRM policies need to be in sync with

training objectives and policy interventions. This is required to ensure placement of the right person at the right place and at the right time. Following are the main elements of the HRM framework required:

#### 2.4.1. Matching of Competencies with Role Requirements

2.4.1.1. Starting with recruitment of the right incumbents for each job description, equipping them with the right set of skills and timely training inputs, and placing them in positions best suited to their capabilities, HRM will be at the forefront for matching individual competencies with organizational requirements, to ensure optimal productivity for the organization while ensuring job satisfaction for the employees. By mapping competencies post recruitment and judicious career progression planning for each individual, both these objectives can be met by setting work performance goals and expectations and assigning appropriate job training programs.

2.4.1.2. Employees are more engaged when they believe that their organization cares for them and their growth and provides avenues to achieve their individual career goals. Career progression planning provides employees with vision and tools to enhance their skills and knowledge that can lead to specialization, promotions and transfers to new or different positions. Implementing CPP also has a positive impact on the organization by improving employee morale, job satisfaction, motivation, productivity, and responsiveness in meeting organizational objectives.

Figure 7: Matching of Competencies with Role Requirements



## 2.4.2. Alignment of Change Requirements with Change Management Trainings, as Per Changes in Policy and Technical Environments

2.4.2.1. In the rapidly shifting work environment, no organization can afford to be left behind due to obsolescence, change in technology or the changing world of work. With increasing automation, the workforce constantly needs to be re-skilled, trained, and brought up to speed with the changes being affected. Hence HRM will need to be sensitive and flexible to changes in policy, technology and environment, and align staffing and training with the changes mandated, to ensure that the organization is able to keep abreast with the changes.

## 2.4.3. Developing of Domain Expertise by Ensuring Stagewise Incremental Learning and Certification

2.4.3.1. Increasing competition and monopolised skill expertise in the world necessitates that organizations keep up with competitors by honing on skills and constantly work on improving their knowledge and skill levels to stay in business. This is possible only by investing time and resources in developing a core team of subject matter specialists having mastery in their respective fields of expertise. By identifying key personnel for domain expertise and investing in their best-in-class training and global exposure, through incremental and progressively more specialised courses and trainings, at eminent institutions duly certified and armed with diplomas and degrees, EPFO can hope to develop in-house domain expertise in relevant areas like social security, compliance, investments and capacity building.

Figure 8: Training Strategy Components



#### 2.4.4. Minimum Training Duration to be Fixed at 3 Percent of Total Man Days and Training Budget at 3 Percent of Salary Budget

2.4.4.1. The total number of training days for all officials will be 3 percent of the total man-days worked over the service period. Considering the total number of working days as 260, 3 percent of total man-days come to roughly 8 training days per year per EPFO official. The minimums therefore for training are fixed as follows:

- 8 days of training per year
- weeks training in a block of 5 years
- 2 weeks at every promotion

#### 2.4.5. **Supplementing Formal Training with Mentored Online Self-Learning**

2.4.5.1. Recognising that training is a continuous, incremental and ongoing process, in keeping with the mandate and spirit of **Mission *Karmayogi***, self-learning at each learner's own pace, and in keeping with their unique learning needs will be prioritised. By ensuring access to the best -in class curated content via online platforms, any-devise-anytime learning will be encouraged. One aspirational training as per choice, in addition to identified training interventions will be provided to every official every year.

#### 2.4.6. **Earmarking of at least 3 Percent of Salaries Budget for Training Purposes Every Year**

2.4.6.1. This outlay is the minimum envisaged, in line with the national training policy guidelines, and will ensure that budget constraints do not hamper the scope and the quality of training interventions. Sufficient budgetary allocation can be made to PDNASS and Zonal Training Institutes. At least 3 percent of the total salary budget will be earmarked for training activities in a given year, excluding capital expenditure.

2.4.6.2. For the purpose of developing infrastructure as envisaged in the institutional framework, sufficient budget under capital expenditure head needs to be separately provisioned for. The authority to sponsor officials for International Training and for those domestic trainees who have a foreign component shall be the Central Provident Fund Commissioner.

## 2.5 Institutional Framework

2.5.1. PDNASS and the 5 ZTIS / SUB ZTI to Function as Core Centres of Learning, Training and Research

2.5.1.1. In view of the fixation of minimum number of training days at 8 days per year per official, on sanctioned staff strength of 25000, the total training man-days required are 200000. This is too high a number to be handled by the existing infrastructure. Present physical training capacity of PDNASS and ZTIs, is not more than 75000 man-days in a year. Therefore, additional capacity will need to be created in a phased manner. Following will be the broad strategy:

### **A. INCREASING INHOUSE CAPACITY**

- Phase up training capacity gradually, starting with the staff in place, and with 50 percent of the targeted man-days, including all types of trainings and workshops
- Look into creation of more physical infrastructure, additional number of ZTIs and Sub-ZTIs, ideally, one training facility per 10000 staff members
- Zonal offices can be co-opted to serve as centres of self-guided, continuous and incremental learning by embedding learning facilities in every zone, and eventually in each RO as well. This will be done by provisioning of iGOT platform in learning centres, access to e-journal subscriptions, e-books, kindle devices, and by adoption of a blended learning approach.

### **B. CO-OPTING OF KNOWLEDGE PARTNERS AND FRIENDLY INSTITUTES**

- Existing and additional tie-ups with prominent national and international institutes will be fostered and strengthened, especially for niche and specialized trainings, and for third party certifications, degrees and diplomas.
- For tie-ups, the top ranking 10 institutions in the related domain shall be preferred both at national and international levels.
- Collaboration with training institutes of other government departments shall also be explored.

### C. USING INNOVATIVE AND SELF-LEARNING METHODOLOGIES

- In addition, blended and online modes, along with self-learning modes will be employed to achieve the training targets. New initiatives, software launches, hand-on virtual trainings and pre-recorded learning modules will be made available at each learning centre, and self-contained self-learning modules curated for learners in each zone based on their training needs.

Figure 9: Optimal Mix of Several Modes for Training



#### 2.5.2. Developing Centres of Excellence

2.5.2.1. As PDNASS is developing into a centre of excellence in social security it would be having numerous centres headed by experts specializing in different aspects of social security and allied fields. A few examples of centres to be developed in PDNASS over time are as follows:

- A. Regional centres for undertaking studies in Social Security in following regions:
  - South Asia
  - Latin America
  - Africa
  - Europe
  - North America
- B. Theme based centres for excellence will also be developed over time. A few illustrations are as under
  - Universalization of Social Security
  - Pensions
  - Design of schemes
  - Informal Sector dynamics
  - Financial sustainability
  - Labour market economics
  - Actuarial valuation of Social Security

- Sustainable investment of Social Security Investments

2.5.2.2. The centres listed above are only indicative. The list can be revisited periodically for expansion. Development of specific centres will also be part of capacity building plan for the triennium and the year.

### 2.5.3. Infrastructure

2.5.3.1. PDNASS and ZTIs should be equipped as world class institutes with state-of-the-art infrastructure and facilities at par with international institutes, to be able to host international participants and events.

2.5.3.2. Training academies should preferably be located away from city environs, in places close to nature and conducive to residential learning. They should host administrative buildings, well designed and equipped hostels, hygienic automated mess facilities and sufficient training infrastructure including but not restricted to:

- Auditoriums enabled with advanced two-way broadcasting capability to create a virtual learning environment
- Tech-enabled smart lecture halls with interactive multimedia
- Indoor and outdoor sports facilities, tie-ups with premier sports academies for hand-picked officials who have potential to excel in sports
- Well-equipped gyms, swimming pools and facilities for recreation as well as beyond class reading and learning
- Hobby corners for unwinding, self-expression and developing the creative side of the personality
- Yoga facilities with trained instructors

2.5.3.3. In line with Group A officials, Group B officials should also have a separate academy and training infrastructure. In addition, existing ZTIs should be upgraded and a greater number of ZTIs created to cater to staff training requirements of one ZTI per 10000 staff. ZTIs need to be residential, with well-equipped computer labs and full-time faculty to cater to hands-on training of staff on a continuous basis.



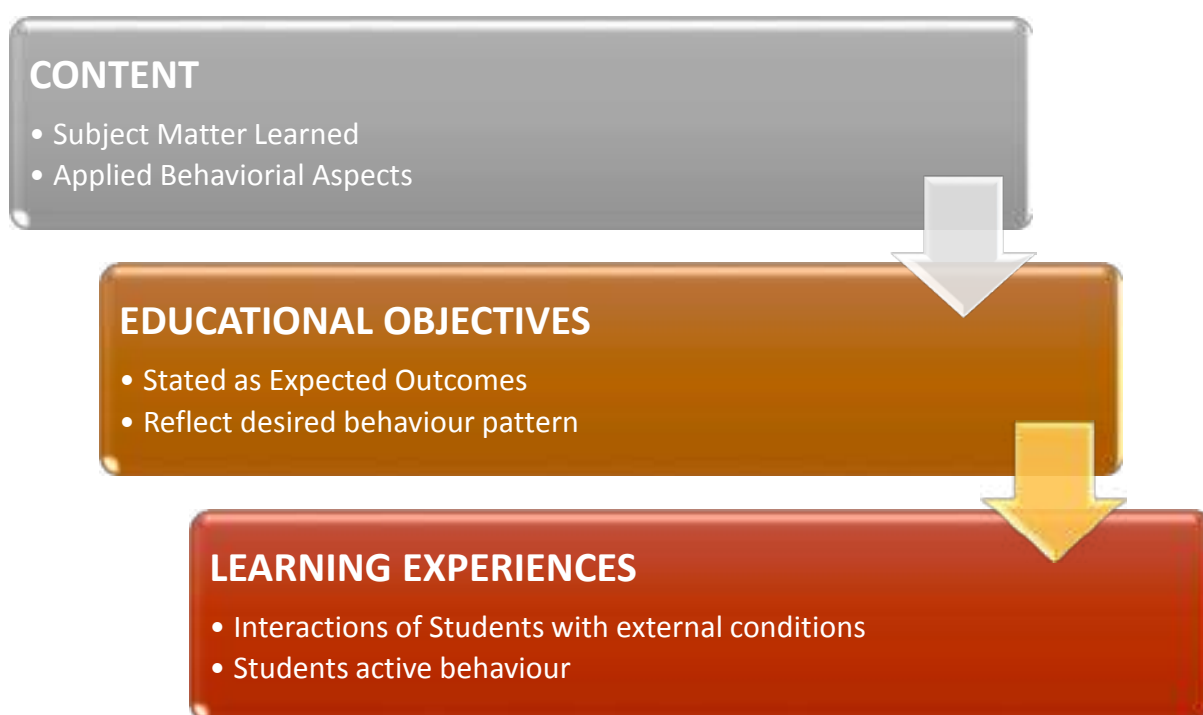
## 2.5.4. Strategic Tie-Ups with National and International Institutions

2.5.4.1. Tie ups with world renowned eminent institutions like ITC-ILO, ISSA, VVGNLI, IIMs etc will be pursued and finalised to position PDNASS as a global frontrunner in Social Security knowledge training and research and a global knowledge hub. Through exchanges of faculty, collaborative workshops and seminars, institutional linkages will be sought to be developed and strengthened.

## 2.5.5. Partner with Leading Professional Course Designers and Content Creators for Developing World Class Learning Curricula and Content

2.5.5.1. The strength of any training program is its content. With the advent of professionalism in content creation, it will be endeavoured to source and develop the best in class relevant and high-quality content, which will be curated to cater in the best way possible to the learning needs of its intended audience.

*Figure 10: Creation of Training Content to cater to Learning Needs*



## 2.5.6 Faculty

2.5.6.1 PDNASS and ZTIs shall endeavour to engage regular faculty in subjects pertaining to the core curriculum, drawn from recently retired group A officers and other eminent subject experts.

2.5.6.2 A panel of visiting faculty shall be selected from serving and retired officers of other government institutes of repute, especially for subjects related to general administration and office procedure

2.5.6.3 Serving Group A officers on volunteer basis to teach relevant and current subjects related to EPFO

2.5.6.4 Professional trainers be called to train in behavioural aspects e.g., motivation, leadership, emotional intelligence, organizational ethics, stress management etc.

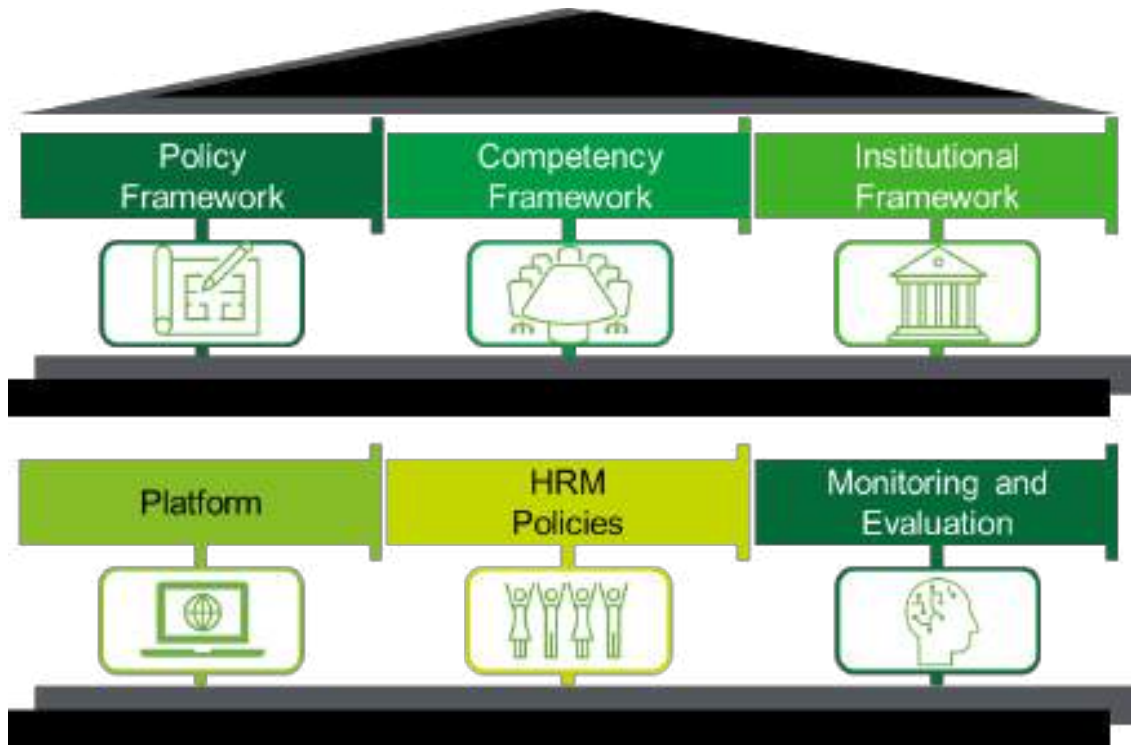
## **2.6 Monitoring and Evaluation Framework**

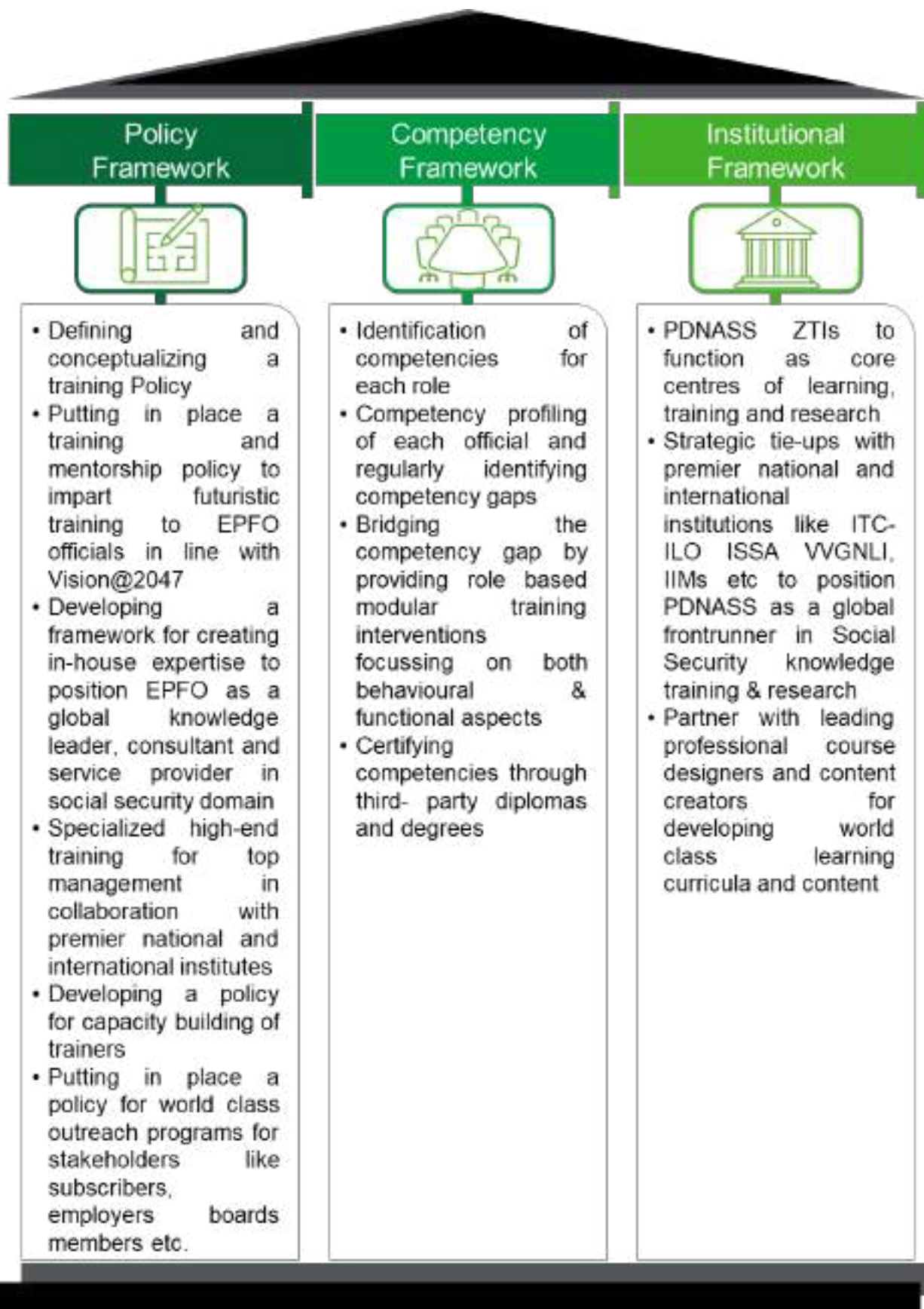
2.6.1. An effective monitoring and evaluation framework is necessary to evaluate skill gaps and performance issues to provide timely feedback and plan to remediate concerns. This involves the use of performance appraisal methods, monitoring tools and feedback loops, in order to ensure that training interventions are effective, and leading towards enhanced organizational productivity, performance and image building. Following are the envisaged elements:

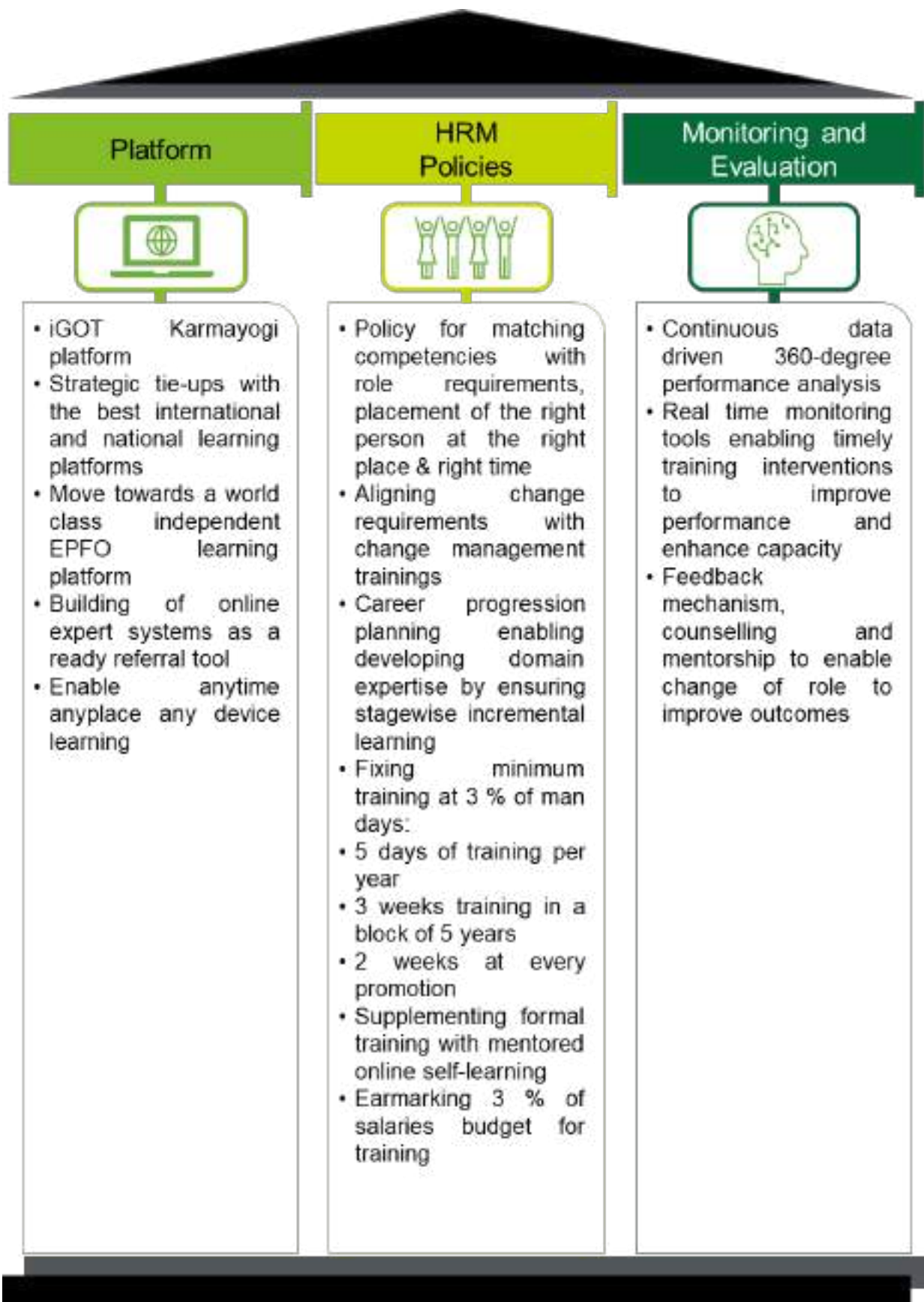
- Continuous data driven 360-degree performance analysis using standardised and personalised tools
- Real time monitoring tools enabling timely training interventions to improve performance and enhance capacity
- Feedback mechanism, counselling and mentorship to enable change of role to improve outcomes
- The effectiveness of the training will be measured on the basis of skills, knowledge and competency gained from the program and how is the employee expecting to implement the new skills in his/ her work. Training activities are evaluated to determine whether the objectives and the expectation, on which the training modules are based, have been met.
- At the end of every training, evaluation will be carried out through feedback forms and face to face discussion.

The program approach in a nutshell, is summarised as follows, in conformity with **Mission Karmayogi** guidelines and the six key pillars of the National Programme for Civil Services Capacity Building (NPCSCB):

Figure 11: Six Key Pillars







## Chapter 3: Strategy

### 3.1 Competency Mapping and Career Progression Planning

3.1.1. Competency Profiling of all newly recruited officers and staff will be created including the following:

- Education qualifications
- Experience
- Interests
- Strengths

3.1.2. A competency database shall be maintained and matched with competencies required for each role in the EPFO organogram. Psychometric testing will be employed for adopting a data driven approach to identification of strengths, skill gaps, and training requirements, as well as for important workforce planning decisions, and job-fitment. This will be done in-house with possibility of taking professional assistance through collaboration with a professional agency for design of customized tools for psychometric testing in addition to standardized profiling scales and free resources like Jung and Briggs-Myers personality typological testing, personality assessments, DISC profiling among others.

3.1.3. Career progression planning will pick up from competency mapping in order to figure out possible career paths for the officials, and mechanisms to upgrade their skills from this point going forward, in a targeted and realistic manner. This will entail:

- Self-Assessment, discussion and counselling
- Evaluation of EPFOs organizational needs and fitment of individual's career aspirations therein
- Identification of training requirements, resources and other support the organization can provide. This can the form of
  - Bringing in expert speakers on the chosen topic
  - Offering courses and other training opportunities
  - Pairing with a mentor in their field
  - Sponsoring outside training, seminars, and other learning events
- Review the CPP with the employee incorporating feedback from reporting managers and mentors if applicable

- Document the plan and submit for approval
- Review periodically, leaving room for changes, training interventions and updating adjustments

Figure 12: CPP Roadmap



## 3.2 Conducting Training Needs Analysis (TNA)

3.2.1. Technology and the labour market are changing very fast, and employees need to be appropriately reskilled in order to cope with the changing world. EPFO is no exception. Periodic Training Needs Analysis (TNA) will help the organization identify training and development needs of employees so that they can do their job effectively and correct training interventions can be provided at the right place and time to ensure that skill sets of employees are aligned with organizational requirements. TNA exercise will be conducted across the organization, comparing expected competencies with gaps, and identifying required interventions.

- TNA will be conducted for each cadre as well as for each individual
- It will be conducted with a bottom-up approach

Figure 13: Training Needs Analysis



### 3.3 Capacity Building Plan and Training Calendars

3.3.1 To achieve the objectives of the training policy, it is important to formulate periodic capacity building plans and to regularly review them. Following are the expected steps and goals based on which annual capacity building plans and training calendars will be finalized.



Figure 14: Formulation of Capacity building plan



3.3.2. Capacity building plan will be developed for 5 years and reviewed annually to make adjustments to achieve the organizational objectives in the context of the changing milieu. The training calendar will be formulated annually in consultation with divisional and zonal heads by February every year.

### 3.4 Designing and Tailoring Appropriate Training Interventions

3.4.1. Training interventions would include onsite learning designed to complement the off-site learning methods as focus areas. On-line content will be developed by associating in-house faculty with professional content developers co-opted by the iGOT Platform. With the passage of time, however the possibility of in-house creation of contents especially with regard to EPFO's domain competence will be encouraged. Tie-ups with the best available national and international learning platforms shall be explored. EPFO shall strive to create its own world class learning platform using state-of-art technology.

### 3.5 Modes of Training

3.5.1. There are various methods to impart training. Post pandemic, virtual training platforms have gained both popularity and primacy, due to wider reach and cos-

effectiveness. Training will therefore be attempted to be delivered through following modes:

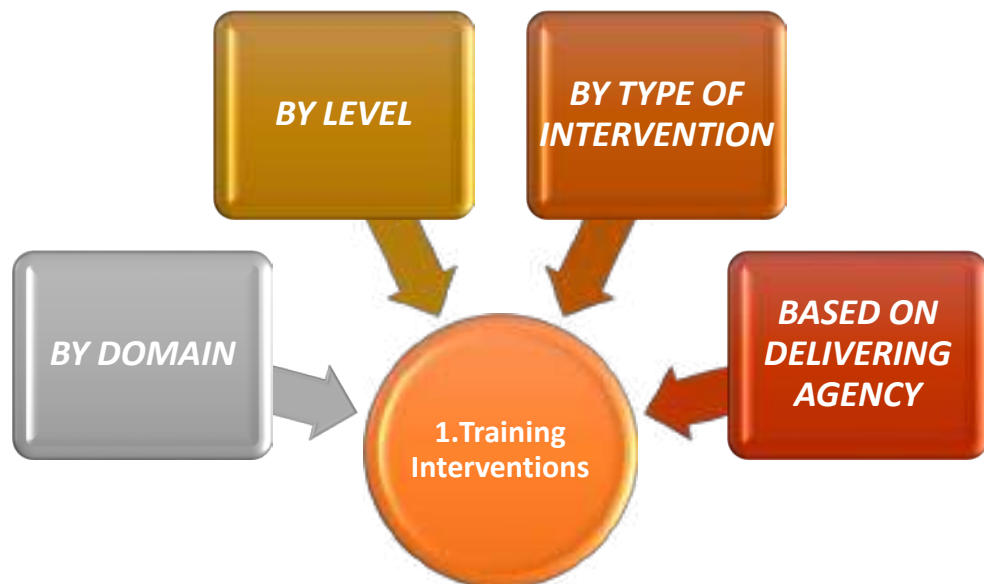
- Physical
- Online
- Hybrid

3.5.2. To encourage wider participation, all courses offering updating of current knowledge, new developments etc. should be conducted online simultaneously for benefit of all officers' pan India. Several self-paced learning modules will be available on iGOT platforms embedded in zonal offices, as well as available on individual systems or devices, which trainees can access and complete at their own pace and obtain certificates.

## 3.6 Training Interventions

3.6.1. The training interventions have been categorized across the following heads:

*Figure 15: Training Interventions*



### **A. CATEGORIZATION BY DOMAIN**

For the purpose of simplicity, training will be broadly categorized into the following broad areas, in conformity with **Mission Karmayogi** guidelines:

- Domain knowledge: Specialized relevant subjects to develop domain knowledge and skills for knowledge updation according to the job/function.
- Functional Skills: Practical Skills necessary for employees in their day-to-day functioning, like office procedures, computer skills and good drafting MS office, Excel etc.
- Behavioral Skills: To develop personal attributes that enhance an employee's interactions effectively with other employees internally or externally.

### **B. CATEGORIZATION BY LEVEL**

By level of competency, trainings will be classified into 3 categories:

- Basic
- Intermediate
- Advanced

### **C. CATEGORIZATION BY TYPE OF INTERVENTION**

- Modular trainings
- Seminars and Workshops
- Webinars
- Think Tank Workshops
- Online and mentored self-learning modules
- Expert discourses
- MOOCs and other Distance learning modes

Figure 16: Categorization by Type of Intervention



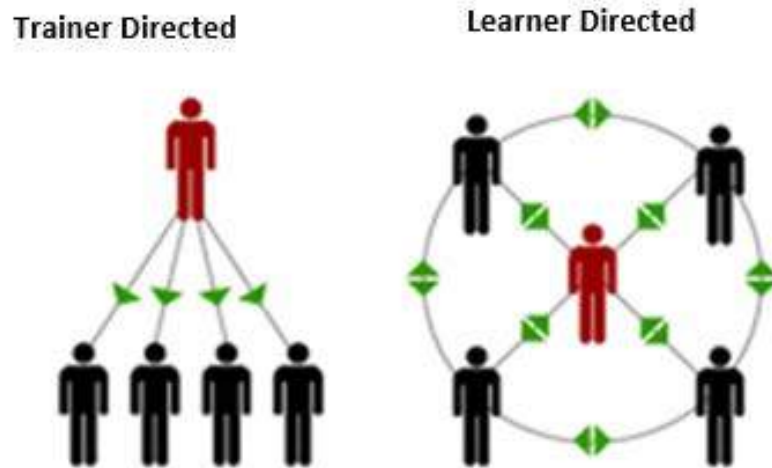
#### **D. CATEGORIZATION BASED ON DELIVERING AGENCY**

- In-house
- Through partner institutions

### **3.7 Learner Centric Learning**

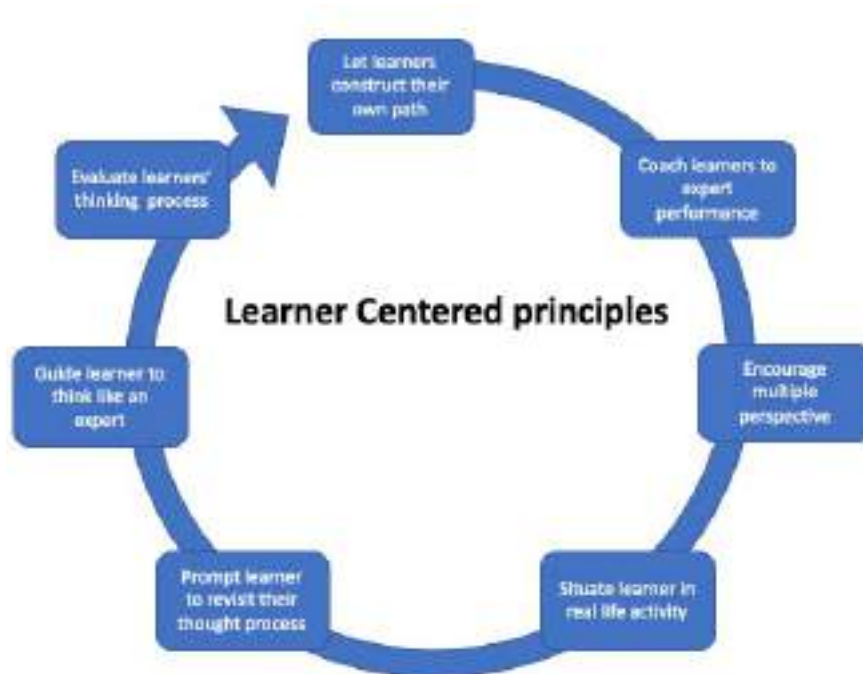
3.7.1. Training will be learner centric rather than trainer or institution centric, designed around an individual and a cadre's learning needs, and tailored to their unique learning styles and personalized learning paths.

Figure 17: Trainer Directed Vs Learner Directed Learning



3.7.2. To keep pace with the rapidly changing world of work, officials need to be upskilled and cross-skilled at regular intervals. They need to constantly unlearn and relearn. Self-assessment and feedback will be an important part of the learning, which will by design be flexible, allowing trainees to learn at their own pace, and directed by their role based and individual learning needs.

Figure 18: Learner centric principles



## 3.8 Common Tenets of Training for All Cadres

3.8.1. All cadres will be subjected to training appropriate to their competency level and role. The following aspects of training will be common to all cadres:

- Competency profiling
- Career progression planning
- TNA
- Mentoring
- Development of expertise and Succession Planning
- Learner directed decentralized training

All cadres will also be subjected to

- Induction training on joining, of different durations ranging from 3-12 months depending on the cadre.
- Refresher training post a year of joining, and
- Mandatory trainings on promotion
- Appropriate long-term training
- Short term trainings based on functional requirements
- Hands on where required
- On the job training
- Trainings at partner institutions

## 3.9 Tenets Specific to Different Cadres

3.9.1. Tenets specific to different cadres will be based on their role requirements as well as career progression pathways. Further, the weightages will also be differential. The mode of training and delivery agency for each group of services will be catered to the unique requirements of each group. The salient features of training requirements of each group are as follows:

Group A	Group B	Group C
<ul style="list-style-type: none"> <li>• More behavioural and managerial insights and OLQs</li> <li>• Continuous updation to keep up with changes in work dynamics, policy, and international developments</li> <li>• Learning requirements to be guided by requirements to lead and put EPFO on the global map</li> <li>• Mentors from premier national and international partner institutions</li> <li>• Trainings to lead to certifications</li> </ul>	<ul style="list-style-type: none"> <li>• Greater supervisory insight and leadership inputs</li> <li>• Significant domain expertise and functional competencies, to be continuously updated</li> <li>• Field functionaries will require more practical interventions, specialized financial and actuarial inputs, and communication skills.</li> <li>• On transition to Group A cadre, training needs and interventions to be merged</li> </ul>	<ul style="list-style-type: none"> <li>• Greater emphasis on functional and domain skills, including computer skills, noting drafting and office procedure</li> <li>• Training to be oriented towards practical and hands-on work, and more on-job-training</li> <li>• Intensive training on application software</li> </ul>

3.9.2. In summary, each cadre will require the following level of inputs in each competency:

Cadre	Leadership	Managerial	Technical	On job
Group A	✓✓✓	✓✓✓	✓✓✓	✓
Group B	✓✓	✓✓	✓	✓
Group C	✓	✓	✓✓	✓✓✓

Figure 19: Weightage by Training Interventions

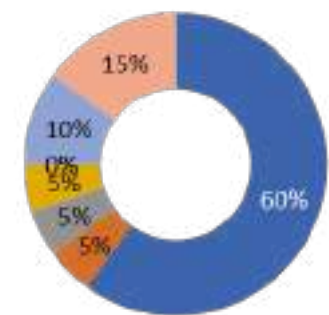
Group A



Group B



Group C



- Modular training
- Workshops
- Expert lectures
- Online and mentored self learning
- Seminars
- Outbound trainings
- Think tank workshop
- Distance learning



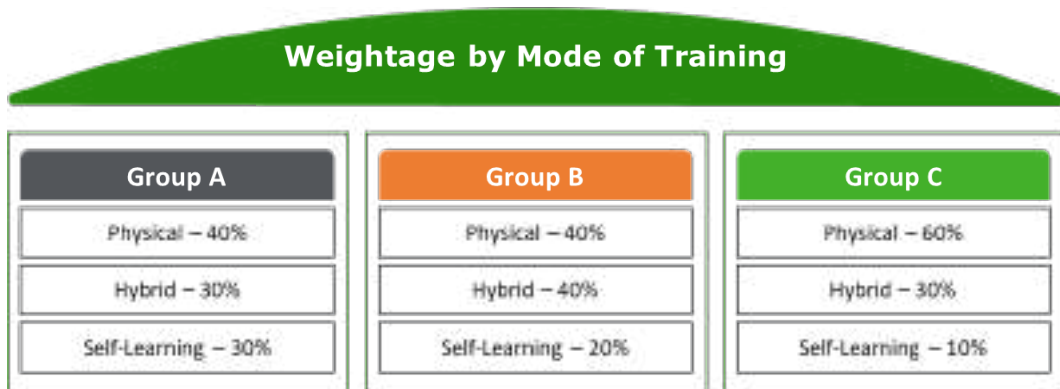
The weightage of types of training is summarized below.

Figure 20: Weightage by Domain



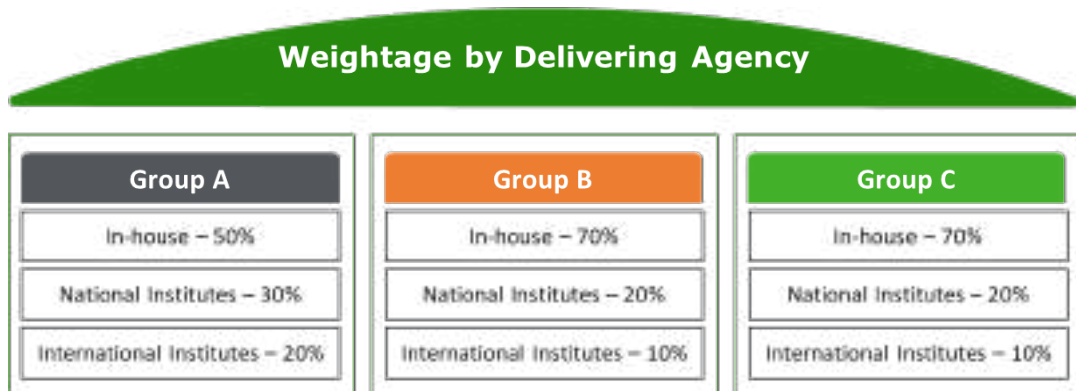
The weightage by modes of training is summarized below.

Figure 21: Weightage of Mode of Training



The weightage by delivering agency is summarized below:

Figure 22: Weightage by Delivering Agency



## 3.10 Schedules and Deadlines

### 3.10.1. Five Yearly Review of Training Policy

3.10.1.1. The period of five years will be counted from the date of publication of the training policy

Action	Indicative Timelines
Calling inputs from divisional heads, zonal heads, associations and individuals	1 <sup>st</sup> - 30 <sup>th</sup> June
Draft preparation	1 <sup>st</sup> - 31 <sup>st</sup> July
Consultation with divisional heads	1 <sup>st</sup> - 15 <sup>th</sup> August
Consultation With zonal heads	16 <sup>th</sup> - 31 <sup>st</sup> August
Redrafting and circulation for comments	1 <sup>st</sup> - 30 <sup>th</sup> September
Final draft	1 <sup>st</sup> - 30 <sup>th</sup> November
Approval of competent authority	1 <sup>st</sup> - 31 <sup>st</sup> December
Publication and circulation	1 <sup>st</sup> - 31 <sup>st</sup> January

3.10.1.2. The entire process will be initiated, monitored and handled by PDNASS. The competent authority for the approval will be the Dean/ CPFC.

### 3.10.2. Review of Capacity Building Plan for Each Triennium

Action	Indicative Timelines
Calling inputs from divisional heads, zonal heads, associations and individuals	1 <sup>st</sup> - 30 <sup>th</sup> April
Draft preparation	1 <sup>st</sup> - 31 <sup>st</sup> May
Consultation with divisional heads	1 <sup>st</sup> - 15 <sup>th</sup> June
Consultation With zonal heads	16 <sup>th</sup> - 30 <sup>th</sup> June
Redrafting and circulation for comments	1 <sup>st</sup> - 31 <sup>st</sup> July
Final draft	1 <sup>st</sup> - 30 <sup>th</sup> September
Approval of competent authority	1 <sup>st</sup> - 31 <sup>st</sup> October
Publication and circulation	1 <sup>st</sup> - 30 <sup>th</sup> November

### 3.10.3. Capacity Building Strategy for Each Triennium

3.10.3.1. Capacity building strategy will commence after approval of triennial capacity building plan and will complete in 3 months.

### 3.10.4. Annual Capacity Building Plan

Action	Indicative Timelines
Calling inputs from divisional heads, zonal heads, associations and individuals	1 - 30 <sup>th</sup> June
Draft preparation	1 <sup>st</sup> -31 <sup>st</sup> July
Consultation with divisional heads	1 <sup>st</sup> – 15 <sup>th</sup> August
Consultation With zonal heads	15 <sup>th</sup> – 31 <sup>st</sup> August
Redrafting and circulation for comments	1 <sup>st</sup> – 30 <sup>th</sup> September
Final draft	By 30 <sup>th</sup> November
Approval of competent authority	By 31 <sup>st</sup> December
Publication and circulation	15 <sup>th</sup> Feb

### 3.10.5. Annual Capacity Building Strategy

3.10.5.1. Capacity building strategy will commence after approval of triennial capacity building plan and will complete in 3 months.

### 3.10.6. Annual Training Calendar

Action	Indicative Timelines
Calling inputs from divisional heads, and zonal heads	1 <sup>st</sup> - 30 <sup>th</sup> June
Draft preparation	1 <sup>st</sup> – 31 <sup>st</sup> July
Consultation with divisional heads	1 <sup>st</sup> - 31 <sup>st</sup> August
Consultation With zonal heads	1 <sup>st</sup> - 30 <sup>th</sup> September
Redrafting and circulation for comments	1 <sup>st</sup> - 30 <sup>th</sup> November
Final draft	1 <sup>st</sup> - 31 <sup>st</sup> December
Approval of competent authority	1 <sup>st</sup> - 31 <sup>st</sup> January
Publication and circulation	1 <sup>st</sup> - 15 <sup>th</sup> February

## 3.11 Indicative Capacity Building Plans for Guidance

3.11.1. At **Annexure 4**, indicative capacity building plans for group A, B, C and miscellaneous cadres have been placed for initial guidance. These are purely indicative and shall not restrict any deviation from these in view of changing organizational needs and growth of capacity building of EPFO.

## Chapter 4: Summary and Highlights

- 4.1. *Training Policy is a tool to create a future ready manpower to achieve its objectives, vision and mission*
- 4.2. *Building on the **Mission Karmayogi** document and guidelines, the document is constructed on a framework of 6 pillars, namely*
  - *Policy Framework*
  - *Institutional Framework*
  - *Competency Framework*
  - *Learning Framework*
  - *Human Resource Management Platform*
  - *Monitoring and Evaluation Framework*
- 4.3. *It envisages regular and periodic TNA to identify learning gaps, and appropriate training interventions to bridge the gaps as well as upgrade competencies of officials in the following areas:*
  - *Behavioral*
  - *Domain*
  - *Functional*
- 4.4. *It envisages a decentralized institutional framework and a learners centric training approach*
- 4.5. *Fixes minimums of 8 days of training per year per official and 3 percent of annual salary budget as training budget*
- 4.6. *Continuous self-learning and mentoring,*
- 4.7. *Periodic capacity building plan based on TNA and role requirements*
- 4.8. *Development of expert systems*
- 4.9. *Developing of experts through periodically reviewed CPP and strategic training interventions*
- 4.10. *Development of Centres of Excellence in sector-specific and niche areas*
- 4.11. *Training of Trainers through collaboration with premier institutions*
- 4.12. *Promoting higher levels of learning and third-party certifications*

# Annexures

## Annexure-1: Mentorship Policy

This mentorship policy envisages identification and development of senior experienced officers to act as mentors of new employees, called mentees, to enable them to access learning resources and navigate workplace culture and relationships better, as they learn on the job, and benefit from the experience of their seniors. It is designed to work as a development tool and support system, in continuation to and supplementing formal training.

### BENEFITS OF MENTORING

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#### FOR THE MENTEE:

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- Complements formal training and provides a practical background for theoretical knowledge, as well as resolution of doubts
- Helps in acclimatising to organizational culture and ethos, teaches respect for hierarchy and correct protocols
- Increases career networks and facilitates interaction between junior and senior officers
- Improves ability to express expectations, goals, and concerns, helps in goal setting and career planning and growth.

#### FOR THE MENTOR:

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- Enhances skills in coaching, counselling, and modelling behaviour
- Provides opportunity for passing on learned skills, experience and insights, and of leaving and continuing service legacies
- Personal fulfilment, legacy ship,

Both the mentor and the mentee give and grow in the mentoring process. The success of mentoring will depend on clearly defined roles and expectations in addition to the participant's awareness of the benefits of participating in the mentoring program.

### SELECTION OF MENTORS

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- Mentors should as far as possible be selected from volunteers willing to accept the responsibilities implicit in the mentoring process. Apart from senior officers of

PDNASS and ZTIs, and other officers of the department, mentors may also be chosen from other academies, ministries

- Mentors also need to have traits such as desire to help others, developed coaching and facilitation skills, also they must be approachable and available
- They should be amenable to training to enable them to effectively perform their roles and must be willing to work with the mentees direct supervisors at work, to ensure optimal learning outcomes
- As mentees grow and specialize, mentors who are veterans and specialists in the relevant fields may need to be chosen and assigned.

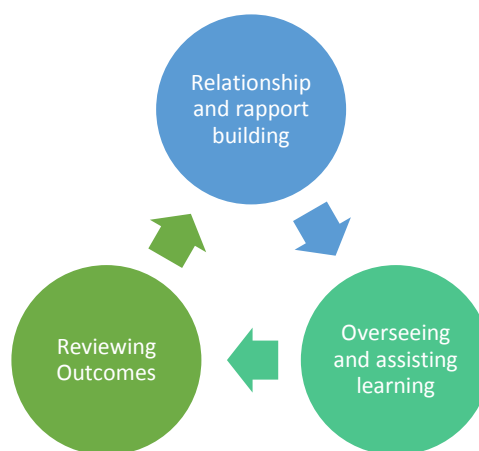
## FUNCTIONING AND OVERSIGHT

The mentoring program will be overseen and be conducted under direct supervision of Director PDNASS. Mentors will be assigned to new recruits upon their induction and will remain in place through the training and probation phases. Depending on the number of probationers, mentors will be assigned on location as far as possible, with no more than 25 trainees assigned to each mentor.

## STAGES IN THE MENTORSHIP PROCESS

Following will be the stages in every mentorship assignment going up the hierarchy, and ensuring equal opportunity and guidance to each individual employee, throughout his career journey:

Figure 23: Stages in Mentoring



## RELATIONSHIP AND RAPPORT BUILDING

Mentoring process begins by establishing a professional, mentoring relationship with the mentee and later the mentee's reporting manager. Having established a suitable development assignment, and having had it contractually agreed with management, the mentor can help the mentee learn while training and the job, taking into account the wider needs of the organisation. It involves:

- Liaison between management, PDNASS, mentors and mentees
- Establishing mentoring goals and ground rules in the beginning along with expectations, learnings and reasonable outcomes.

#### OVERSEEING AND ASSISTING LEARNING

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This phase starts from the beginning of formal training and is meant to keep the mentee abreast of all training interventions, cover any gaps or weak areas and provide ongoing support and help to the mentee. It is governed by the mentoring contract and covers the two main areas of:

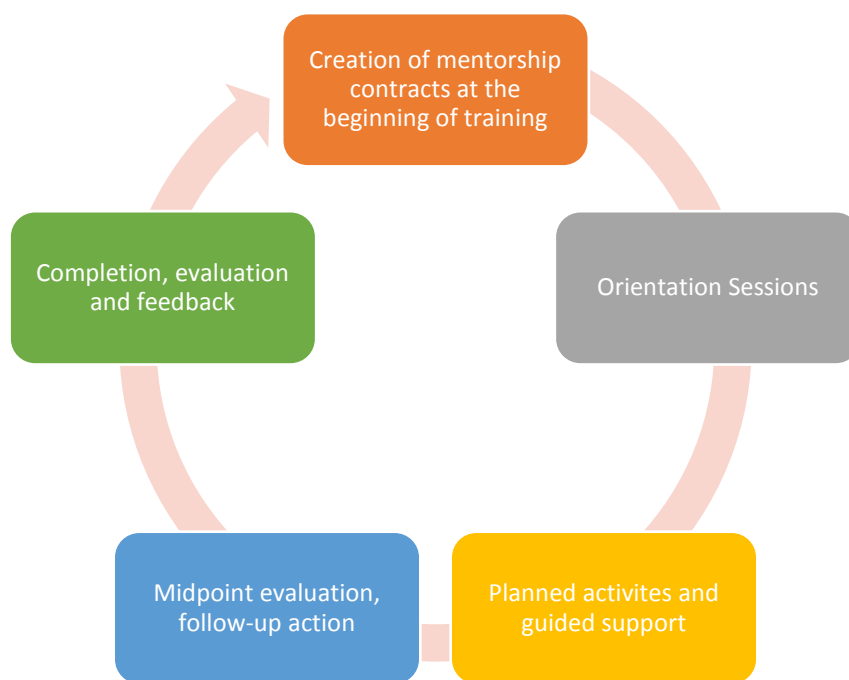
- Identifying resources available to support the mentee's development
- Providing informal guidance, handholding and guiding along the learning curve.

## REVIEWING OUTCOMES

To increase the likelihood of success, it is essential to include formal means for assessment and feedback. The intention is to reassure the mentee about their progress and keep track of the learning curve.

- Assessment should be supportive, involving informal dialogue with a mentee to check progress against agreed targets or objectives.
- It includes advice, feedback and ongoing support to mentees to maintain interaction, motivation and progress. Even after formal training is over.

*Figure 24: Mentoring Process*

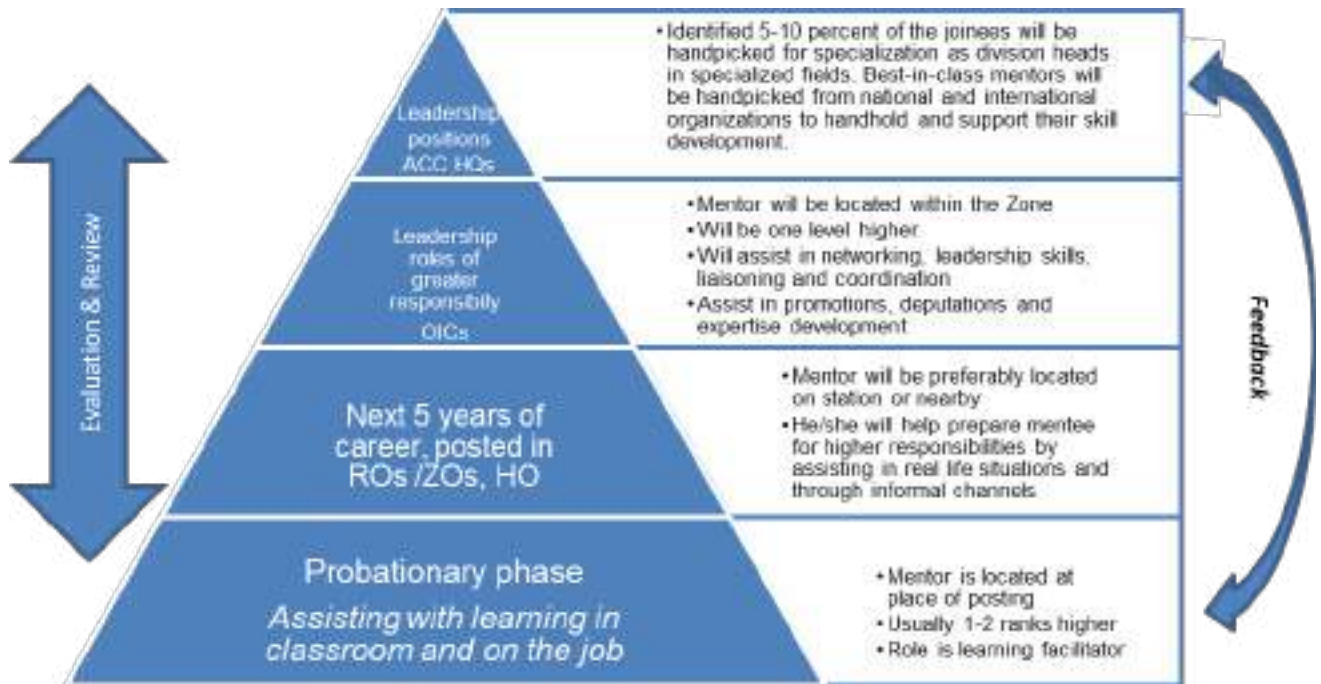




## MENTORSHIP MODEL

Mentorship in the organization will be structured in a hierarchical model, guiding employees through different career stages of their career progression and ensuring availability of the right guidance and resources for their optimal growth and organizational success. Following is the proposed model:

Figure 25: Proposed Mentorship Model



At the conclusion of the training mentors will be reassigned as per posting profile and location, to provide support for ongoing learning on the job, in a support role, in alignment with the reporting manager. There will be conducted a follow-up evaluation three months after the completion of each step to measure the success of the program.

## Annexure 2: Train the Trainer Model

The Train the Trainer model is a training strategy in which the trainer, a subject-matter expert, trains other employees and simultaneously teaches them how to train others in the use of the program. The Training of Trainers (ToT) model is intended to engage Master Trainers in coaching new trainers. Having master trainers also allows an organisation to pass on domain or organisation-specific knowledge from experienced employees to newer ones. This means a new participant typically gets to watch an experienced trainer teach, complete the exercises, and then practice teaching segments to other participants. This assists in development of inhouse expertise. Unless we have proper orientation and training of our trainers at the academy and the ZTIs, we cannot have effective training interventions in place. The elements of an effective ToT program will be along the following lines:

- Team building
- Basic Presentation and Facilitation Skills
- Training Design principles
- Visualisation
- Group Facilitation, Interaction and Group Dynamics
- Learning Space Design
- Classroom Management

### SELECTION OF TRAINERS

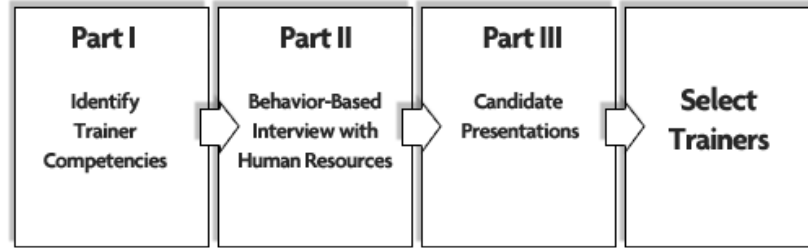
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Selection of trainers to be developed as master trainers will need a skill and aptitude test among volunteers, in order to invest on their development. Following general traits will be considered for selection:

- Aptitude
- Passion and zeal for teaching/ training
- Academic background
- Published papers if any

Selection of candidates for trainers and selection of the courses tailored for these trainees will be based on individual leaning styles. Learning style assessment standard tools like Kolb and 4MAT will be made use of for this purpose. The procedure for selection is summarised in the diagram given below:

Figure 26: Selection of Trainers

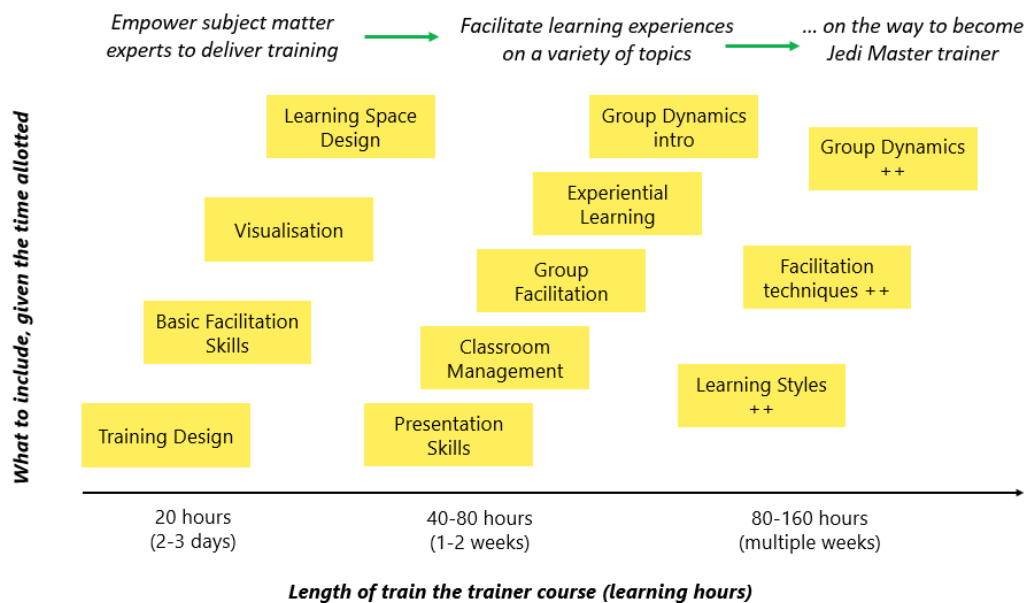


Source: <https://www.totaltrainingsolutions.com/solutions/training-courses/train-the-trainer-solutions/selection-of-trainers/>

## TYPES OF TRAINING COURSES

For developing the above-mentioned skills in trainers, in an incremental manner, we may need to design a series of short- and long-term training programs from 2-3 days to programs running in multiple weeks; Some of these can be done in-house, many will require specialised trainer and certification institutes like DoPT, which has been doing various programs in our academy in batches. Yet more nuanced and specialized programs will require sending of trainers to national and international institutes of repute to properly train them. A standard training template, by duration and intensity, is given below

Figure 27: ToT by Duration



Source: Train the Trainer Course – A Complete Design Guide, Robert Cserti, Blog, November 12, 2018

i. **SHORT INTENSE TRAINING (2-5 DAYS)**

These courses will cover the essential elements of training and will be used to impart basic facilitation and training skills to empower trainees to deliver effective training sessions in their own fields of expertise. Most DoPT courses like Direct Trainer Skills (DTS) Design of Training (DoT), Evaluation of Training (EoT) fall under this category.

ii. **LONG STAGGERED TRAINING COURSES 80-160 LEARNING HOURS**

These courses work best in a blended classroom mode, either through a facilitator master trainer or an accredited institute. There can be recurring weekly or biweekly / weekend training days with the time between each classroom day utilized for assignments and self-learning activities.

iii. **LONG INTENSE: (2-4 WEEKS)**

These courses can be utilized for more specialized and complex topics that a trainer needs to master, such as group dynamics, group facilitation and interaction, “soft skills” and life skills. These courses can be designed as retreats with specialized coaches’ handholding individual trainers.

The following will be the all-inclusive elements of the training agenda

Figure 28: Elements of ToT Agenda



## INSTITUTIONAL TIE-UPS

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Given the plethora of training institutions in the diverse areas of Government functioning, it may be desirable to have tie-ups with a variety of training specialized institutions and to develop cadres of trainers in different sectoral and functional specializations. The following are the institutional suggestions:

- Certification of trainers under recognized Trainer Development Programmes on a renewable and progressively more specialized basis, leading to Master trainer certifications.
- Strengthening the DOPT tie-ups for Training of Trainers, particularly, DTS, DOT, EOT, which are already in place, and for which we have infrastructure
- Encouraging trainers to obtain online certification from other national and international reputed institutes and sponsor their certification costs
- Development of domain specific trainers and trainers specialized in development and delivery of courses for wider audiences, like MOOC courses, as well as trainers specialized in imparting soft skills training, administering psychometric tests and scales, and in imparting behavioural skills
- Have training tie-ups with eminent national and international institutes, e.g., ToT program of ITC-ILO. exchange programs with faculty, and collaborative workshops and trainings with experience and knowledge sharing agreements.

## Annexure 3: Building Expertise

### AIM

To develop high performing employees into subject matter experts (SMEs) through right training, grooming and appropriate exposure and over time consolidate world class in-house expertise in areas of social security, finance and investment, Pensions, Training and Research, and other relevant fields. As a next step, implement replacement and succession planning of subject matter expertise through second line mentoring, grooming and development.

### RATIONALE

In a fast-moving world, expertise is a valuable commodity. Presently, EPFO requires and hires professional expertise in key operative business areas of fund investment, Pension Actuary, Software development, among others. Hiring of professional expertise from outside is costly, time-consuming and occurs as a recurring expense. Training our own officers avoids not only the cost, but over time pays dividends of passing down of the developed expertise to the second rung of learners, ensuring continuity and consolidation of knowledge. Not only is this accumulated knowledge valuable, but it is also unique and hard to replicate providing an opportunity for the organization to provide consultancy in its key domain areas to other national and international organizations, which is a key goal and pillar of this training policy.

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Figure 29: Developing Subject Matter Experts

## SUBJECT MATTER EXPERT

What SMEs Need to Know



Source: [www.krm.com](http://www.krm.com)

Knowledge, skill, and achievement are all critical components of expertise. People who become experts tend to acquire a body of knowledge that makes them one of the most informed individuals in their field. As such their role and responsibilities are crucial to the organization's success.

Figure 30: Subject Matter Expertise

## SUBJECT MATTER EXPERT

### Responsibilities



## PROCEDURE FOR DEVELOPMENT OF EXPERTISE

### IDENTIFICATION AND SELECTION OF EXPERTS

There's an expectation that the company's subject matter experts have a high level of technical skill, however it is not a prerequisite. Experts may be drawn from all ranks and may include officers, technical leads, analysts and consultants. The organization may also remain open to laterally source talent and absorb it or promote from among the technical ranks with good incentives and benefits, For the organizations HR policy may need to be aligned. Other screening factors could be

- Background and Experience
- Aptitude for in-depth study and research, ability to put in long hours of study and application
- Recommendations from field, divisions and peers

### SETTING OF EXPECTATIONS, PLACEMENT OF MENTORS AND PERSONALISED LEARNING PLANS



Expectations should be identified, documented, and shared with individuals being considered for the role and the HRD department. This will help retain clarity while grooming experts. The right mentors can help curate appropriate learning programs and field placements to ingrain competencies for employees to apply what they learn.

However, the expert development plan needs to be kept flexible. Becoming a subject matter expert should not be viewed as the end. Individuals may be allowed move into and out of specialist roles as per requirement and may also be allowed to move to other organizations and back on deputation to further broad base knowledge. As the organization continues to evolve, the SMEs need to stay current and relevant. To achieve this, they must get the proper exposure and growth.

#### SUCCESSION AND REPLACEMENT PLANNING

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Involving subject experts in trainee development and mentorship for specific roles will go a long way in transmission of skills across hierarchies and in succession and replacement planning of manpower for long term expertise development and retention in the organization. This can also be built into the new apprenticeship scheme currently under consideration, to apprentice and attach fresh recruits to the experts in identified fields for their proper handholding and expert development.

## Annexure 4: Sample Capacity Building Plan

indicative capacity building plans for group A, B, C and miscellaneous cadres have been placed for initial guidance

### A. COMMISSIONERS' CADRE GROUP 'A'

#### INDUCTION TRAINING

The Induction Training Programme for direct recruited Officers should comprise a minimum of 12 months of staggered training both at the Academy and on field. The departmental promotee officers from Group 'B' to Group 'A' shall also be imparted training on the above lines except for the introductory modules.

- a) 3 months of Core curriculum including Social Security concepts, EPF Act and schemes, and associated functional areas.
- b) 2 months of on-job training, attachment with field offices and headquarters, as well as visits to establishments and factories
- c) 2 months legal training for basic primer in labour law and quasi-judicial proceedings at NLUs
- d) IT hands-on training for familiarisation with application software as well as basic and advanced computing skills, MS Office and cyber security
- e) *Bharat-bhraman* to familiarise trainees with diversity of occupations, major industrial clusters and overview of working conditions in the country
- f) Behavioural and attitude training for inculcating OLCs and also developing empathy, maturity, communication and leadership skills and camaraderie, as well as organizational ethics, values and attitudes of high moral probity

#### REFRESHER PROGRAMME

- For newly promoted APFCs from Group 'B' to Group 'A' and for directly recruited Group 'A' shall be mandatorily held for a duration of one month after two years of completion of Induction course.
- Refresher course is proposed to be for a duration of 6 weeks
- Collaboration with other departments such as Income tax (CADT, Nagpur), state administration etc. to share relevant knowledge and work process
- Format of refresher course will be informal discussion based and experience sharing rather than lecture based.

## MANDATORY MID-CAREER TRAININGS

Given the highly responsible and critical positions on the matters of EPFO, officers are required to hold and high expectation of Services for prompt and correct service deliveries from Department, it is imperative that they possess the necessary knowledge, skills and attitudes to discharge their responsibilities effectively. With this in mind, it is proposed to have a system of Mid-Career Training that would be more intensive and would enable them to acquire 'Next Level Competency' and to realize a long-term vision of paperless office of EPFO by effective use of information technology in all the areas of its functioning. Following 3 phases are proposed:

- a) Early mid- career
- b) Mid-career
- c) Senior level

An attempt has been made to classify the present commissioner's cadre officers based on prevailing administrative hierarchy:

Top Management	Level 13A and above
Middle Management	JAG, NFSG
Junior Management	LEVEL 10, STS

Conduct mid-career training as follows:

Sr. No.	Phase	Eligible rank	Duration	Minimum Years of Service in Group A
1	Phase-I	Level 11& 12	6 weeks (4 weeks in India & 2 weeks abroad)	7 years
2	Phase-II	Level 13	4 weeks (2 weeks in India & 2 weeks abroad)	15 years
3	Phase-III	Level 13 A & above	3 weeks (1 week in India & 2 week abroad)	22 years

Each of these programs would have to be delivered to complete batch or batches of Officers (all those recruited in one year or years) ranging from 20 to 25 each year in each program.

PDNASS will carry out the detailed design of each of the different phases of mid-career training programs, namely the Phase III, IV and V programs based on the training needs explained in para no. 2 above and will select Institutes in India and Abroad as per the requirement of training needs.

## FOREIGN TRAINING

*'Foreign training fills a crucial gap in the training system. It provides opportunities for officers to gain exposure to the latest thinking on different subjects in some of the leading institutions of the world. It exposes them to experiences and best practices of different countries with differing models of There is a need to continue and strengthen the DFFT scheme as well as other similar schemes of various cadre controlling authorities so that officers have the opportunity to attend both long-term and Short-term programmes to develop in-depth competencies in a range of subjects/areas or specific specialized subjects' development and governance. This is particularly important for officers who are likely to hold positions at the senior most levels of Government where they need to be aware of, and take into account, the broader global context in policy formulation as well as international best practices.'*

*National Training Policy 2012*

The above Training Programmes would be mandatory in nature and institutional tie-ups shall be entered into with best-in-class educational institutions for imparting training as above.

## NON-MANDATORY SHORT AND MEDIUM TERM AND SPECIALIZED TRAININGS

- In addition to mandatory training programmes, officers shall attend short- or medium-term training programmes conducted by PDNASS to update their skill sets based on posting requirements
- At each promotion the officers shall attend two weeks course at PDNASS to sensitise them to the higher professional responsibilities. Such courses should be conducted preferably within three months of the promotion order.
- Officers with more than fifteen years of service shall be sponsored to attend trainings conducted by any Institution of National importance at least twice in their careers.
- Officers with twenty years or more of service shall be sponsored to attend conferences, workshops or seminars/symposium conducted by

reputed International Institutions. Such sponsorship shall be made to all officers fulfilling the eligibility criteria at least twice in their career

## FOREIGN TRAINING

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Foreign training has been recognized by the National Training Policy 2012 as an important part of any organization's training policy. Since 2001, the scheme of Domestic Funding for Foreign Training (DFFT) has remained the main source under which officers are sent for foreign training. As per the NTP, there is a need to continue and strengthen DFFT schemes of various cadre controlling authorities so that officers have the opportunity to attend both long-term and short-term programmes to develop in-depth competencies in a range of specialized subjects.

Officers will accordingly be encouraged to undergo foreign training in any of the programmes identified by DoPT under its DFFT programme for a minimum of 3 times in their entire careers, preferably between 7<sup>th</sup> to 9<sup>th</sup> years, 13<sup>th</sup>, and 15<sup>th</sup> year and between 25<sup>th</sup> and 28<sup>th</sup> year of service. The foreign Training component shall be managed at the Head Office in collaboration with NATRSS, with CPFC as the competent authority.

## TERMS AND CONDITIONS AND ELIGIBILITY CRITERIA

### SERVICE CONSIDERATION:

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All Group 'A' officers are eligible to apply for foreign training programmes.

### MINIMUM SERVICE:

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Officers should have completed a minimum of 5 years of regular service as on the date of start of the training.

### UPPER AGE LIMIT:

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The upper age limit for long term and short-term training programmes will be 55 years and 58 Years respectively on the date of start of the training. However, there is no age limit for the short-term programmes meant only for officers of Grade pay of Additional Commissioners and above.

### COOLING-OFF CONDITIONS:

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- After attending a foreign training programme of up to one month, officers will be required to complete a cooling-off period of 12 months before they can be considered again for another training programme.
- After attending a foreign training programme of more than one month and up to six months, officers will be required to complete a cooling-off period of 24 months before they can be considered again for another training programme.
- After attending a foreign training programme of more than six months, officers would be required to complete a cooling-off period of 36 months before they can be considered again for another training programme.
- Job Specific / Project related training/official visits abroad, irrespective of duration, are exempted from the provisions of cooling off.
- The foreign component of any compulsory mid-career training programme undergone by the officer will not be counted for the purpose of 'cooling off'.
- The condition of cooling-off after a short-term programme (up to six months) will be applicable only for short-term programmes.
- An officer is eligible for only three long-term programmes in his/her career.
- In case of officers who have undergone a long-term domestic programme at IIMs, TERI, MDI, NDC, etc. which includes foreign training component, cooling-off period will depend on the length of the foreign training component of such domestic programmes.
- Officers will also be encouraged through appropriate special funding to participate in Social Security/ Policy making forums in their individual capacity to the extent of meeting the travel costs.

While selecting the officers, apart from administrative needs it should be ensured that equal opportunity is granted to all the officers. Women officers will be especially encouraged.

#### **CATEGORIZATION OF LONG TERM AND SHORT-TERM PROGRAMMES:**

Training programmes abroad of duration of six months or more shall be treated as *Long Term*. Training programmes abroad of duration of less than six months shall be treated as *Short Term*.

#### **SELECTION OF CANDIDATES**

## **CBT MEMBERS**

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For CBT members, courses will be identified each year by PDNASS, and nominations shall be called from all the Board members. An appropriate number of Board members would be shortlisted by a selection committee headed by the Chairman CBT in consultation with Chairman EC and the Central Provident Fund Commissioner. Funding will also be available to Board members to present original papers of their own to conferences and seminars on social security abroad. The administrative and financial powers to facilitate this shall vest with the Chairman CBT.

## **CBT EMPLOYEES**

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Nominations shall be called from officers/officials for the foreign training programmes from the list of courses as approved by DoPT. Shortlisting will be done by PDNASS. In any training preferably there should be selection of officers from field and non-field. Funding will also be available to Board employees to present original papers of their own to conferences and seminars on social security abroad, to the extent of economy class fares and entitled living expenses. This however will not be treated as a part of the training. The administrative and financial powers including permission to leave the country to facilitate this shall vest with the Central Provident Fund Commissioner.

## **NATIONAL AND INTERNATIONAL SEMINARS**

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Group 'A' cadre officers should be sponsored for and encouraged to participate in domestic and international seminars, undertake research in relevant fields, and present papers.

## **B. GROUP 'B' ENFORCEMENT OFFICERS / ACCOUNTS OFFICERS / SECTION OFFICERS (SO)/ SECTION SUPERVISOR (SS)/ ASSISTANT SECTION OFFICERS**

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The organization shall endeavour to have a separate dedicated set up for structured and periodic training of group B officers, with separate infrastructure of training and residence.

The Induction Programme for Direct Recruits for the post of Enforcement Officers (EO)/ Accounts Officer (AO), and for Assistant Section Officers (ASO) are to be conducted

separately keeping in mind their specific functional needs. Orientation course will be provided on promotion for the post Section Officers (SO), Section Supervisor (SS).

## ENFORCEMENT OFFICERS / ACCOUNTS OFFICERS/ SECTION SUPERVISOR

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### INDUCTION

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The Induction Programme for EO/AO (DR) shall be for a period of 6 months (including field office attachment). The curriculum of training shall be so prepared to achieve the following objectives.

- To develop an understanding of the organisation's mandate, structure, policies, processes, norms, and its interface with other organisations.
  - Organizational awareness and alignment of personal development with organisational objectives.
  - To give an overview of domain and service specific functions of the officers/staffs
  - IT hands-on training for familiarisation with application software as well as general (MS Office) and advanced computing skills and cyber security
- a) There shall be **Four Weeks Training** which will be purely residential, and will familiarize the probationers with the provisions of the Act & Schemes, Accounting Manuals, office procedure, grievance redressal mechanism in EPFO, Data Analysis etc.
- b) **Four Weeks training** at National Law Institutes and training institutes of other government departments to familiarize them with the provisions of the Labour/Social Security Code, CPC, Cr.PC, IPC, Search, Seizure & Arrest procedures, engaging Police, Independent Witness and official of Govt. agencies in carrying out search & Seizure. Drafting of Panchnama and recoding of statements. Legal and Procedural Requirement and NADC Nagpur.
- c) **Two weeks** training at Institutes approved by the Accountant General Office for examination of the Balance Sheets of the establishment from the perspective of the EPF & MP Act.
- d) **One Week Training** at NDC for exposure to various application software viz SSP, Unified Portals, IW, UAN, CAIU Portals, Dashboards using testing servers.
- e) **Fourteen Weeks** on the job training schedule shall be prepared by the Respective Regional Offices with the approval of the concerned ZTI to provide exposure to all



the duties in the work domain of EO/AO. Every incumbent will also be assigned one Mentor for proper guidance and resolution of doubts in discharging the duties. The Training Schedule shall also include visit to the exempted and unexempted Establishments for on the job, Field exposure to the Probationer incumbents.

- f) Confirmation in the cadre shall be subject to successful completion of the Induction Course.

#### REFRESHER COURSE

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After a period of one year of completion of Induction Programme the new Recruits shall be mandated to undergo Refresher Programme of one month duration.

#### ORIENTATION COURSE ON PROMOTION

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Upon promotion, each incumbent will be required to undergo an orientation program of 2-3 weeks to prepare them for additional higher responsibilities.

#### REGULAR TRAININGS

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In addition, short-term programmes shall be conducted by PDNASS and Zonal Training Institutes at regular intervals to familiarize with the latest amendments in the Act/Schemes, Latest Circulars and updates in various Application software's.

- a) As per requirement Institutional linkages with Accountant General Office and with Law Universities and other academies may be ensured for subject specific training modules to enhance the competence of EOs and AOs.
- b) Training Intervention for Group 'B' entry are not envisaged post fifteen years of service as it is reasonable to assume that sufficient promotional prospects exist enabling absorption into Group 'A' cadre.

#### SECTION OFFICER/ ASSISTANT SECTION OFFICER

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The service conditions and job profile of the SOs/ ASOs is at par with that of the CSS Cadre. The Induction Programme for the post of Assistant Section Officers (ASO) (DR) are to be conducted separately keeping in mind their specific functional needs. It may be done in collaboration with ISTM.

## INDUCTION COURSE

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- a) For ASO (DR) the duration of Induction course shall be for 3 months (including attachment in Head office/Zonal Office/Regional Office).
- b) **Four Weeks** Training shall be in the ZTI which will be purely residential, the course contents of which shall include organisation's mandate, structure, policies, processes, norms and its interface with other organisations, Organizational awareness, Understanding Formal Structure and familiarizing with the provisions of the EPF Act/Scheme/Accounting Manuals, Grievance Redressal mechanism, Data Analysis etc
- c) **Four Weeks** training at Govt Institutions like ISTM to familiarize them with the office procedures, noting drafting, Data analysis etc
- d) **Four Weeks** on the job training schedule shall be prepared by the ASD, HO/ Zonal Offices to provide exposure to all the duties in the work domain of ASO. This shall include **One Week** Training at NDC for exposure to various application software's viz SSP, Unified Portals, IW, UAN, CAIU Portals, Dashboards using testing servers Every incumbent will also be assigned one Mentor for proper guidance and resolution of doubts in discharging the duties. The Training Schedule shall also include visit to the Regional Offices for exposure to the various jobs of the Field Offices, enforcement and accounts related functions.
- e) Confirmation in the cadre shall be subject to successful completion of the Induction Course.

## REFRESHER COURSE

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After a period of one year of completion of Induction Programme the new Recruits shall be mandated to undergo Refresher Programme of one month duration.

## ORIENTATION COURSE ON PROMOTION

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Upon promotion, each incumbent will be required to undergo an orientation program of 2-3 weeks.

## REGULAR COURSES FOR GROUP B

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In addition, short-term programmes shall be conducted by PDNASS and Zonal Training Institutes at regular intervals to familiarize with the latest amendments in the

Act/Schemes, Latest Circulars and updates in various application software. This will include modules to prepare them for additional higher responsibilities.

## C. GROUP CADRES:

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### INDUCTION COURSE

- a) The Training Intervention periodicity for Group 'C' cadre (DR) (including Compassionate Appointments) shall consist of mandatory Induction Course of one month's duration at Zonal or sub-Zonal Training Institutes and two-week training at ISTM or similar institutes for general skills related to file management and noting/drafting. The training shall emphasize on organisation's mandate, structure, Statutory Schemes, policies, processes, norms etc.
- b) The ZTI shall prepare and upload the induction material on the website of the Department for easy accessibility
- c) The Field Offices shall also organize 'On the Job' and 'In-house' training for 6 months or as may be required to familiarize them with official work

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### REFRESHER COURSES

Post induction, after one year, a mandatory refresher training will be held of 2 weeks duration.

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### ORIENTATION COURSES

Upon promotion, each incumbent will be required to undergo an orientation program of 2 weeks.

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### REGULAR COURSES

- a) There shall be a set of short-term thematic courses of two to five days duration held at Zonal Training Institutes round the year.
- b) Nominations shall be made to these courses by the respective Zonal Offices from the list of Group 'C' official in each Regional/Zonal Office.
- c) The programmes shall give special emphasis on building functional competency in discharging day to day work while also including elements of soft skills enhancement and general behavioral and personal growth.

- d) Where feasible, use the services of the Training Institutions in developing the cadre training plans, outsourcing training can be explored.
- e) The training shall aim to provide requisite knowledge, skills and attitude to effectively perform the functions they are entrusted with. so as to improve customer orientation as well as quality of service delivery to the EPF members.
- f) The opportunities for training shall not be restricted only at the mandated points in a career but will be available to meet needs as they arise through a mix of conventional courses, distance and e-learning.
- g) For general office work related skills which are common in government offices e.g., file management, e-office, noting and drafting, communication with clients (Members and employers) etc may be taken from other institutions.
- h) *Espirit de corps* among staff would enhance inter section and inter office coordination and therefore joint tour programs, field visit and other team building exercises may be arranged during induction program as well periodically to enable sharing of learning.
- i) Two days or 10 hours of core work of section related self-learning course with certificate may be included whenever inter-sectional transfer is made within an office.
- j) IT hands-on training for familiarisation with application software and basic computing skills including MS Office.
- k) Language training for non-local staff to make them familiar with regional language in collaboration with Central/ State institutes.

#### D. MISCELLANEOUS CADRES OF EPFO

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- a) In addition to the regular cadres involved in regular line and staff functions, specialised cadres such as Information Services, Vigilance directorate, Infrastructure Development Services, Official Language, Stenographical cadre etc. are also to be imparted training at regular intervals for enhancing their skills sets.
- b) As these cadres are involved in providing services of a specialized nature training should be imparted with the involvement of Organisation and Institutions related to their field of work.
- c) Possibility of attachment with Technical Organisations such as NIC, CDAC, Standardisation, Testing and Quality Certification (STQC), National Institute of

Electronics and Information Technology (NIELIT) and like organisations shall also be explored.

- d) The Official language will be trained in collaboration with Central Institute of Indian Languages Ministry of Human Resource Development, Kendriya Hindi Prashikshan Sansthan, Central Translation Bureau and related institutes, administered by the Department of Official Language.
- e) Stenography cadre needs to be given training in partnership with Institutes of Secretarial Training and Management. Participation in such programmes shall be mandatory before consideration for promotion to the next cadre.
- f) In addition, these cadres shall also be nominated in general programmes to enhance their efficiency and effectiveness.

#### TRAINING FOR TOP LEADERSHIP

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- a) Specialised training at premium institutes in India and abroad are envisaged for top leadership, viz, officers in cadre of CPFC, CVO, FA&CAO, and Director PDNSS
- b) International exposure to acquire global acumen and provide effective leadership
- c) Global education tie-ups
- d) Annual retreats for regrouping and strategizing

#### TRAINING OF TRAINERS

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Organizations grow with skilled manpower and having the right training inputs delivered through a trained and skilled set of trainers is crucial to realizing this goal, as well as to put in place change and transformation initiatives that the organisation might undertake. New developments in the field of training techniques and particularly in the use of technology are enabling and facilitating training for large numbers of people, particularly through online and blended learning techniques. There is, therefore, a need to keep abreast of current international best practices in training skills and techniques and develop to develop a cadre of trainers in such techniques and ensure capacity building in this area.

#### INTERNATIONAL TRAININGS AND SEMINARS

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- a) Sponsorship for trainings in institutions of international eminence, e.g., ITC-ILO
- b) Encourage online trainings as per role requirements
- c) Few handpicked international trainings to prepare for expert roles as per organisation requirements
- d) Group A officers should be encouraged to participate in prominent national and international seminars/workshops, undertake research in relevant fields and present papers

#### INDIVIDUAL TRAINING PROGRAMS

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All group A officers who have, on the basis of their qualifications, publications or work experience, obtained admission to any nationally or internationally acclaimed trainings or academic courses which have direct or indirect implications of value additions to the organization, will be enabled to pursue such courses subsequent to due vetting, by sponsoring such officials for such training, subject to such training not being more than once in a block of 3 three years, and with an upper limit of 1 lakh in each case, relaxable by 50 percent further, excluding boarding and lodging. At the beginning of a financial year, a budget, which is renewed annually, is set for each employee and a team.

#### STAKEHOLDER OUTREACH TRAINING

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EPFO has not only to look after training of its officials, but also maintain outreach with all stakeholders like employers, trade unions, workers bodies, CBT members, and employers' associations. Trainings and workshops, instructional seminars and interactions will be organized for all stakeholders from time to time.

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# EPFO

PDNASS

# TRAINING



PANDIT DEENDAYAL UPADHYAYA NATIONAL ACADEMY  
OF SOCIAL SECURITY (PDNASS)  
Employees' Provident Fund Organizaon  
Ministry of Labour & Employment  
Government of India, New Delhi



# TRAINING POLICY

2022