Sensitization Workshop on the Human Resources Strengthening Plan (HRSP) Project

Implemented by the C2D and BTSD Project Team
November 8, 2021 – December 30, 2022

Belize Tax Service Department
Together we build our Country
Your Contribution, Our Growth

Sensitization Workshop Purpose

- Sensitization Workshops for the BTSD, MOECST and MPSCPS on the:
  - BTSD Moodle eLearning Platform
  - Educational program now accessible to the BTSD learner community.

Agenda

- During this workshop, the following topics will be covered along with BTSD's training capability:
  - HRSP Project Overview
  - HRSP Project Phases with emphasis on:
    - Phase 300: e-Learning Platform
    - Phase 400: Execution, Certification and Accreditation
  - HRSP Project Results, Deliverables and Impact.

Per the C2D Proposal/Contract

- "The Belize Tax Service Department (BTSD) is dedicated to strengthening tax administration in Belize in the interest of mobilising domestic revenue. This implies the reinforcement of the organization's human resources. To achieve this objective, a plan to strengthen staff capacity is needed."

Per the C2D Proposal, continued

- In summary, this plan involved:
  - An assessment of 275 BTSD employees based on job profiles.
  - The development and implementation of training programs to reduce gaps between the identified skills and job profile requirements.
  - The acquisition and implementation of an e-Learning platform.
  - Working with the MOECST and MPSCPS to ensure certification of training.

HRSP Project Personnel

- The C2D Team consisted of the following personnel:
  - Project Coordinator, Mr. Nicolas Servant
  - Team Lead, Ms. Diana Osinski
  - Tax Subject Matter Expert, Mr. Stan Beesley

- The BTSD Team consisted of the following personnel:
  - Training Point of Contact, Mrs. Lisa Clare
  - Coordinator Training Development, Mr. Michael Reneau

HRSP Project Personnel, continued

- The BTSD Instructors consisted of the following personnel for the following courses:
  - **Course #1: Managing for Results**
    - Mrs. Lisa Clare
    - Ms. Shirleen Coote
  - **Course #2: Conducting and Closing the Audit**
    - Mrs. Bernelle Mossiah
    - Ms. Imogene Swift
   - Mr. Kirk Archer
    - Ms. Vilma Broaster

Project Personnel, continued

- The BTSD Instructors consisted of the following personnel for the following courses:
  - **Course #3: Tax Administration and Procedure Act - Basic Principles and Requirements:**
    - Ms. Briana Williams
    - Mr. Compton Hinkson
    - Mrs. Marcene Tate
    - Mrs. Sharon Moya
    - Ms. Sofia Hyde

Below were the HRSP Project Phases:

| First month | 5th month | 7th month | 10th month |

Phase 100/Framing

110 Framing of Technical Assistance
111 Project Kick off meeting
112 Identify and confirm Advisory Team
113 Hold technical and administrative focused meetings
114 Literature Review
115 Desk Audit

120 Development of the Detailed Work Plan
121 Outline methodology for the assessment of BTS personnel (and HRM)
122 Outline methodology for the development and implementation of training programs
123 Outline methodology and implementation of e-learning for training
124 Outline methodology for the execution and certification of training

130 Inception Report (P1)
131 Draft of the Inception Report
132 Finalization of the Inception Report

Phase 200/Assessment

210 Competency Assessment Tools
211 Job profiles review
212 Elaborate a set of competencies for four (4) key job profiles
213 Develop self-assessment competency tool for four (4) key job profiles
214 Test self-assessment competency tool
215 Release online self-assessment tool
216 Collect data

220 BTSD Training Assessment Tool
221 Develop and finalize Training Assessment Tool
222 Conduct meetings with Training (and potentially HR) personnel

230 Gap Analysis/Competency Assessment
231 Analyse data
232 Elaborate a competency profile gap for four (4) job profiles

240 Gap Analysis/BTSD Training
241 Analyse data
242 Identify BTSD training (and HR) gaps

250 Assessment Analysis/Bridging the Gaps
251 Identify training courses and activities to bridge the gaps
252 Outline implications of the assessment for HR recruitment, talent mapping, long-term training plan
253 Develop Model so that BTSD can determine the cost of each program

260 Assessment Report (P2)
261 Draft and submit Assessment Report
262 Validate Assessment Report

Phase 300/E-Learning Platform

310 Functional Design
311 Conduct SWOT analysis of comparable e-learning solutions
312 Design e-learning synchronous platform centered on end user needs
313 Validate platform

320 Procurement
321 Deliver e-learning solution with license and access to upgrades
322 Install auxiliary equipment and materials

330 Implementation and Deployment
331 Conduct user tests and adaptations
332 Training the BTSD training team

340 Technical and Documentary Support
341 Provide user manual and training handbooks
342 Provide technical support

350 Sensitization Workshops on the E-Learning Platform (P3)
351 Deliver a sensitization workshop for BTSD personnel
352 Deliver a sensitization workshop for MEYSC and MPSEPU personnel

Phase 400/Execution, Certification and Accreditation

410 Current Certification and Accreditation Requirements
411 Conduct meetings with MEYSC and MPSEPU on training certification
412 Obtain certification of BTSD training when completed
413 Present models for accreditation of BTS courses

420 Training Programs (three (3) courses)
421 Draft and reach agreement on Learning Design Worksheet for each course
422 Build a didactical kit for prototype course (as model for other courses): Participant Guide, Trainer's Guide, Pre and Post Tests, etc.

430 Training of Trainers
431 Develop Training of Trainers Program
432 Deliver the Training Program
433 Support Trainers in delivering first three (3) courses
434 Support HR/trainers in evaluating course results

440 Directory for Training (current and planned)
441 Build and load Curriculum Database (Course Outlines)
442 Load planned course materials for certified courses

450 Sensitization Workshops on Educational Program (P4)
451 Deliver a sensitization workshop for BTSD personnel
452 Deliver a sensitization workshop for MEYSC and MPSEPU personnel

500 Summative Report (P5)
501 Draft and submit Summative Report
502 Validate Summative Report

Phase 100: Framing

Belize Tax Service Department

Phase 100: Framing

Phase 100/Framing

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131 Draft of the Inception Report
132 Finalization of the Inception Report

- Kick off meeting conducted on November 9, 2021.
- BTS Advisory Team formed:
  - Mrs. Michelle Longsworth
  - Mrs. Lisa Clare
  - Ms. Vilma Broaster
  - Mr. Gabriel Bol
  - Ms. Merlene Antonio
  - Ms. Angela Sanchez
- Stand-Alone Report WBS 114 Literature Review and 115 Desk Audit, submitted on September 8, 2022.

Phase 100: Framing, continued

- Methodology established for:
  – Assessment of BTSD personnel
  – Development and implementation of Training Programs
  – Methodology and implementation of eLearning
  – Execution and certification of training.
- Stand-Alone Report WBS 211 Job Profiles, submitted on September 8, 2022.
- Phase 100: Framing Report submitted on December 7, 2021.

Phase 200: Assessment

Phase 200: Assessment

Phase 200/Assessment

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212 Elaborate a set of competencies for four (4) key job profiles
213 Develop self-assessment competency tool for four (4) key job profiles
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- Job Profiles Review (job descriptions) completed and submitted on September 8, 2022.
- Four key job competency profile surveys prepared and implemented:
  - BTSD Audit Inspector
  - BTSD Tax Collector
  - BTSD Taxpayer Services Inspector
  - BTSD Non-Tax Personnel.

(Go to the "Other Reference Material section of the Moodle Workshop" to see the BTSD Competency Profile Surveys)

Belize Tax Service Department

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Phase 200: Assessment, continued

- BTSD Competency Profile Surveys conducted.
- BTSD Human Resources Assessment conducted.
- BTSD Human Resources Development Assessment conducted.
- BTSD Cost Estimation Models Report submitted on April 8, 2022; and training conducted on July 12, 2022.
- Phase 200: Assessment Report submitted on May 9, 2022.

(Go to the "Other Reference Material section of the Moodle Workshop" to see the Cost Estimation Model)

Phase 200: Assessment, continued

Blended Learning recommended for the BTSD
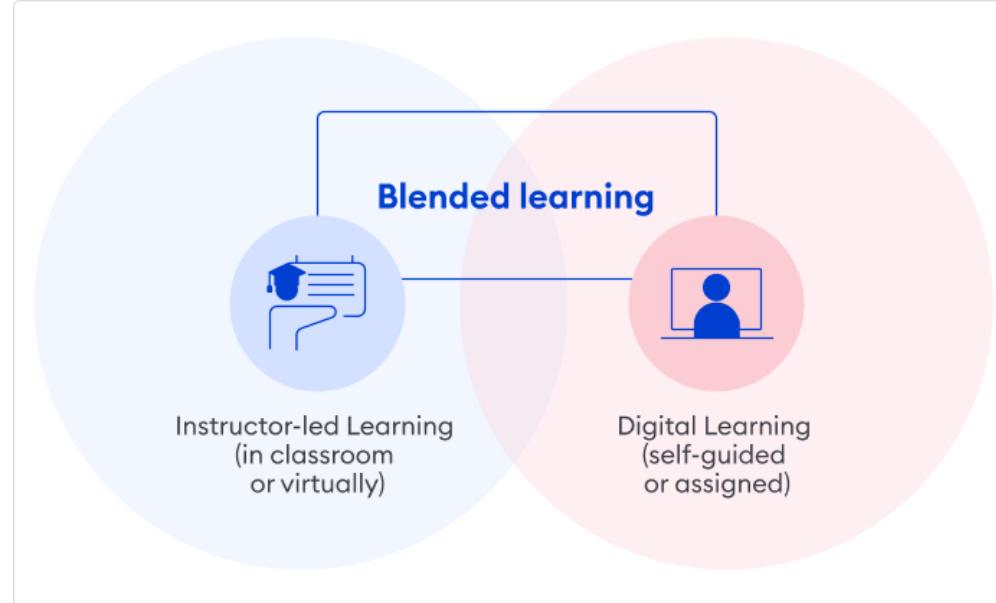
Source : Ispring , October 2021 « What is blended learning an how can it be used » retrieved at: https://www.ispringsolutions.com/blog/blended-learning-a-primer

Cost Estimation Model for Level 2 e-Learning Provided to the BTSD

Level 2 e-Learning (Interactive)

- Level 1 e-Learning content plus 25% (or more) interactive exercises.
- Participants perform virtual "try it" exercises.
- Use of multimedia (audio, video, and animations).
- Confirming participant learning without tests can be challenging.

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Development of Level 2 eLearning
Combining Average Time and Average Cost to Estimate Development Costs

Tasks	% of time spent on each task	Time spent on each task (per finished hour)	1-hour Level 2 eLearning	5-hours Level 2 eLearning	10-hours Level 2 eLearning
Front End Analysis	9%	17.36	$ 1,753	$ 8,767	$ 17,535
Instructional Design	13%	24.69	$ 2,493	$ 12,466	$ 24,932
Storyboarding	11%	20.88	$ 2,108	$ 10,542	$ 21,085
Graphic Production	12%	22.39	$ 2,261	$ 11,305	$ 22,609
Video Production	6%	11.29	$ 1,140	$ 5,700	$ 11,400
Audio Production	6%	11.59	$ 1,171	$ 5,855	$ 11,710
Authoring/ Programming	18%	32.20	$ 3,252	$ 16,260	$ 32,520
QA Testing	6%	11.88	$ 1,200	$ 5,998	$ 11,996
Project Management	6%	11.74	$ 1,185	$ 5,926	$ 11,853
SME/ Stakeholder Reviews	6%	10.96	$ 1,107	$ 5,533	$ 11,066
Pilot Test	4%	7.41	$ 748	$ 3,740	$ 7,481
Other	1%	1.63	$ 164	$ 822	$ 1,644
Totals	**100%**	184	$ 18,583	$ 92,915	$ 185,830

Variables:
* Average time of development per finished hour of Level 2 eLearning: **184**
** Average cost of development for 1 finished hour of Level 2 eLearning: **$18,583**

NOTE: The numbers above assume that all tasks are repeated for each hour of instruction. The study did not explore the efficiency and reduction of time for longer courses by task.

Research data collected: September 2010, by Chapman Alliance

A Cost Estimation Model was also provided for Instructor-Led Training

Instructor-Led Training

- Only one Level
- Face-to-face learning
- Easy to adapt training to fit participants
- Instructor confirmation of learning (and retention)
- Cost effective

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PASSIONATE ABOUT INNOVATIVE LEARNING

Development of Instructor-Led Training (ILT)
Combining Average Time and Average Cost to Estimate Development Costs

Tasks	% of time spent on each task	Time spent on each task (per finished hour)	1-hour ILT Course	5-hour ILT Course	10 hour ILT Course
Front End Analysis	12%	5.36	$ 739	$ 3,695	$ 7,391
Instructional Design	16%	6.84	$ 944	$ 4,722	$ 9,444
Lesson Plan Development	12%	5.06	$ 698	$ 3,492	$ 6,985
Creation of Handouts	8%	3.38	$ 466	$ 2,331	$ 4,662
Student Guide/ Workbook Development	11%	4.83	$ 667	$ 3,336	$ 6,671
PowerPoint and/or other visual development	16%	6.76	$ 933	$ 4,667	$ 9,335
Test and Exam creation	8%	3.42	$ 472	$ 2,360	$ 4,720
Project Management during Development	7%	2.88	$ 397	$ 1,987	$ 3,973
SME/ Stakeholder Reviews	8%	3.45	$ 477	$ 2,384	$ 4,768
Other	2%	1.01	$ 139	$ 697	$ 1,395
Totals	100%	43 *	$ 5,934 **	$ 29,672	$ 59,345

Variables:
* Average time of development per finished hour of ILT: 43
** Average cost of development for 1 finished hour of ILT content: $5,934

NOTE: The numbers above assume that all tasks are repeated for each hour of instruction. The study did not explore the efficiency and reduction of time for longer courses by task.

Research data collected: September 2010, by Chapman Alliance

Phase 200: Assessment, continued
BTSD Training Plan was prepared based on the BTSD Competency Profile Surveys

Audit Training – 28 Courses			
Phase I	**Phase II**	**Phase III**	**Advanced**
1. Law of Tax Administration and Procedures 2. Filing Requirements 3. Audit Preparation 4. Report Writing 5. Conducting and Closing an Audit 6. Basic Accounting Principles 7. Taxpayer Rights 8. Personal Income Tax Law 9. Communication Techniques 10. Using RMS	11. Review Procedures 12. Review Report Writing 13. Review Audit Planning and Use of the Audit Model 14. Corporate Income Tax Law 15. Partnerships and Consortiums 16. Indirect Methods	17. GST Law 18. Advanced Audit Techniques 19. Review of Rights 20. Audit Planning Review 21. Report Writing Review 22. Practical Exercise	23. Advanced GST 24. Advanced Issues – Jeopardy Assessment 25. Advanced Issues – Fraud Referrals 26. Advanced Issues – Construction Contract Accounting and Related Tax Issues 27. Advanced Issues – Permanent Establishment and Attributions of Profits 28. Advanced Issues – Transfer Pricing

BTSD Training Plan, continued

Tax Collection Training – 32 Courses		
Phase I	**Phase II**	**Advanced**
1. Law of Tax Administration and Procedures 2. Collection Procedures and RMS 3. Communication Techniques 4. Declaration Submission Requirements and Preparation 5. Taxpayer Registration and De-registration 6. Installment Agreements 7. Taxpayers Rights 8. Assessment, Penalties and Liens 9. Levies and Seizures and Sales 10. Statute Expiration and Passive Accounts	11. Law on Business Organizations 12. Corporate Income Tax Law 13. Law on Personal Income Tax 14. Law on GST 15. Review Declaration Submission Requirements and Declaration Delinquencies 16. Review Penalties 17. Locating Taxpayers, Passive Accounts and Tax Collectors 18. Review Levy and Seizure Procedures 19. Review Lien Procedures 20. Advanced Financial and Installment Agreements 21. Advanced Collection Issues – Nominees 22. Advanced Collection Issues – Beneficial Owners 23. Advanced Collection Issues – Asset Transfers 24. Advanced Collection Issues – Responsible Person Assessments	25. Review Lien Filing and Lien Priorities 26. Transferee Assessments 27. Responsible Person Determination 28. Nominees 29. Beneficial Owners 30. Jeopardy Cases 31. Identifying Fraud and Fraud Referrals 32. Advanced Communication Techniques

BTSD Training Plan, continued

Taxpayer Services Training – 16 Courses	
Phase I	**Phase II**
1. Taxpayer Education Procedures and Reports	13. Review Law on Tax Administration
2. Law on Tax Administration and Procedures	14. Review Personal and Corporate Income Tax Laws
3. RMS Research and Operation	15. Review GST Law
4. Taxpayer Registration	16. Use of RMS and Procedural Review
5. Personal Income Tax Law	
6. Corporate Income Tax Law	
7. Withholding Requirements	
8. GST Laws	
9. New Taxpayer Visits and Procedures	
10. Communication Techniques	
11. Penalties and Assessment	
12. Declaration Requirements and Declaration Preparation	

BTSD Training Plan, continued

Taxpayer Services Training – 16 Courses	
Phase I	**Phase II**
1. Taxpayer Education Procedures and Reports	13. Review Law on Tax Administration
2. Law on Tax Administration and Procedures	14. Review Personal and Corporate Income Tax Laws
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5. Personal Income Tax Law	
6. Corporate Income Tax Law	
7. Withholding Requirements	
8. GST Laws	
9. New Taxpayer Visits and Procedures	
10. Communication Techniques	
11. Penalties and Assessment	
12. Declaration Requirements and Declaration Preparation	

BTSD Training Plan, continued

Essential, Soft Skills and Information Technology Training – 16 Courses		
BTSD Staff Essentials	**Communication Skills Training**	**Information Technology**
1. BSTD Staff Orientation 2. BTSD Ethics and Integrity 3. Time and Work Management 4. Essentials of BTSD Customer Service	1. Effective Communication Skills 2. Effective Presentation Skills 3. Technical Writing	1. Microsoft Windows 2. Internet Basics 3. Microsoft Outlook 4. Microsoft Word – Level I 5. Microsoft Word – Level II 6. Microsoft Excel – Level I 7. Microsoft Excel – Level II 8. Microsoft Excel – Level III 9. Microsoft PowerPoint 10. Introduction to RMS

BTSD Training Plan, continued

Management Skills Training and Training of Trainers – 13 Courses	
Management Skills Training	**Training of Trainers Program**
1. Human Resources for Non-Human Resources Managers 2. Implementing Strategies Through Project Management 3. Managerial and Leadership Skills 4. Managing Performance and Appraisals 5. Problem Solving and Decision Making 6. Project Management 7. Supervisory Skills 8. Working in Teams	1. Instructional Systems Design 2. Curriculum Development 3. Test Writing 4. Presentation and Facilitation Skills

Course Outline Example
(Click here to see all 105 Course Outlines)

Program Title	Taxpayer Education Foundation Training – Phase I
Course Title	Taxpayer Education Procedures and Reports
Course Hours/Days	6 hours/1 day
Target Audience	This course is intended for Taxpayer Services Inspector.
Course Description	In this course, participants will gain knowledge of procedures to be followed in their daily work in the Taxpayer Education function, including the reports that are required. Included in this course is an understanding of the various kinds of certifications issued by the BTSD taxpayer education function, as well as e-declaration support.
Course Objectives	At the end of the course, participants will be able to: 〉 Explain what reports are required and the procedures to be followed in dealing with taxpayer inquiries. 〉 Describe the e-declaration process and be able to support taxpayers in downloading their declarations.
Assessment Strategy	Pre and Post-tests
Course Delivery	To be Determined
Course Language	English
Pre-requisites	None

*(Go to the "Other Reference Material section of the Moodle Workshop" to see the **BTSD Course Catalogue**)*

Phase 300: e-Learning Platform

Belize Tax Service Department

Phase 300: e-Learning Platform

Phase 300/E-Learning Platform

310 Functional Design

311 Conduct SWOT analysis of comparable e-learning solutions
312 Design e-learning synchronous platform centered on end user needs
313 Validate platform

320 Procurement

321 Deliver e-learning solution with license and access to upgrades
322 Install auxiliary equipment and materials

330 Implementation and Deployment

331 Conduct user tests and adaptations
332 Training the BTSD training team

340 Technical and Documentary Support

341 Provide user manual and training handbooks
342 Provide technical support

350 Sensitization Workshops on the E-Learning Platform (P3)

351 Delivery a sensitization workshop for BTSD personnel
352 Delivery a sensitization workshop for MEYSC and MPSEPU personnel

- Learning Management System SWOT Analysis (WBS 311) submitted on February 21, 2022.
- Moodle selected as the BTSD Learning Management System (LMS) on March 15, 2022; and demonstrated on April 21, 2022.
- e-Learning Sensitization Workshops combined with BTSD Educational Program Sensitization Workshops.

Key Features of Moodle

- Modern, easy to use interface
- Personalized Dashboard
- Collaborative tools and activities
- All-in-one calendar
- Convenient file management
- Simple and intuitive text editor
- Notifications
- Track progress

Moodle Instructional Methods and Activities

- Assignments
- Chat
- Feedback
- Forum
- Glossary
- Lesson
- Quiz
- Survey
- Wiki
- Workshop

e-Learning Content Options

- Reading Assignments
- PowerPoint
- PowerPoint with Voiceover
- Instructor Led
- Individual Exercises
- Group Discussion/Exercises

e-Learning Exercise Options, continued

- Simple Exercises (i.e., matching, fill in the blank, multiple choice, etc.)
  - Individual
  - Group
- Instructor Led
- Live Group Discussion

BTSD Moodle Administrators

- The BTSD Moodle Administrators consisted of the following personnel:
  – Ms. Iesha Williams
  – Mr. Darren Garcia
  – Mr. Dominique Fabro.
- The Moodle Administrators completed training on July 6, 2022.

- BTSD's new Training Development Coordinator, Michael Reneau, can also administer Moodle since he has extensive Moodle knowledge.
  (Go to the "Other Reference Material section of the Moodle Workshop" to see the Moodle Administrator Training)

Phase 400: Execution, Certification and Accreditation

Belize Tax Service Department

Phase 400: Execution, Certification, Accreditation

Phase 400/Execution, Certification and Accreditation

410 Current Certification and Accreditation Requirements

411 Conduct meetings with MEYSC and MPSEPU on training certification
412 Obtain certification of BTSD training when completed
413 Present models for accreditation of BTS courses

420 Training Programs (three (3) courses)

421 Draft and reach agreement on Learning Design Worksheet for each course
422 Build a didactical kit for prototype course (as model for other courses): Participant Guide, Trainer's Guide, Pre and Post Tests, etc.

430 Training of Trainers

431 Develop Training of Trainers Program
432 Deliver the Training Program
433 Support Trainers in delivering first three (3) courses
434 Support HR/trainers in evaluating course results

440 Directory for Training (current and planned)

441 Build and load Curriculum Database (Course Outlines)
442 Load planned course materials for certified courses

450 Sensitization Workshops on Educational Program (P4)

451 Delivery a sensitization workshop for BTSD personnel
452 Delivery a sensitization workshop for MEYSC and MPSEPU personnel

- Model for course certification drafted and approved by the MOECST.
- Didactical training kit built for the BTSD.
- Train the Trainers program developed and delivered.
- Directory for BTSD training established and loaded on Moodle.
- Sensitization Workshop loaded on BTSD e-Learning Platform.

BTSD Certification Protocol…

BTSD COURSE CERTIFICATION PROTOCOL

Training of Trainers

- Course 1: Instructional Systems Design
- Course 2: Curriculum Design and Development
- Course 3: Test Writing Workshop
- Course 4: Presentation and Facilitation Skills

International Training Standards (ACCET)

- Standard IV: Curriculum Design and Development
- Standard V: Instructional Delivery and Resources
- Standard VI: Qualifications and Supervision of Instructional Personnel
- Standard VII: Admissions and Student Services
- Standard VIII: Student Assessment and Achievement
- Standard IX: Institutional Effectiveness
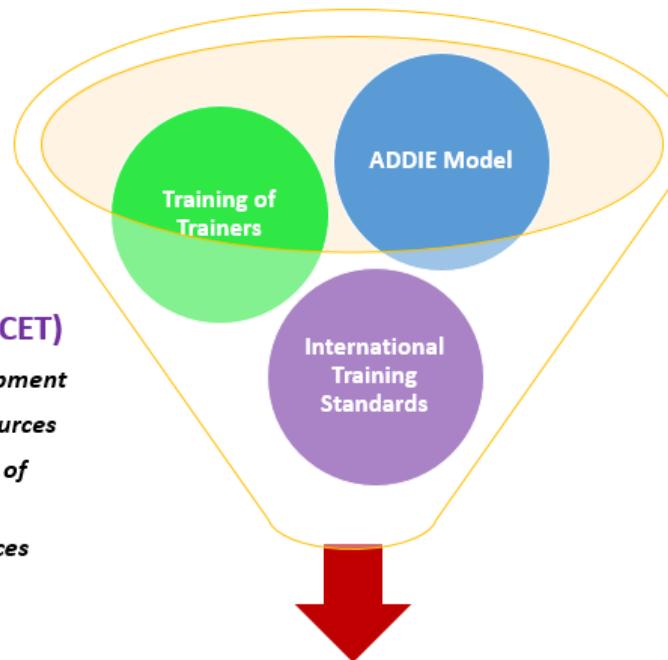
ADDIE Model

- Phase 1: Analysis of the gap between what learners currently know, and what they need to know.
- Phase 2: Design of a learning intervention to bridge the gap.
- Phase 3: Development of learning materials according to the design.
- Phase 4: Implementation (aka Delivery) of training program and materials developed.
- Phase 5: Evaluation of the implementation.

Training of Trainers · **ADDIE Model** · **International Training Standards**

"Certificate of Completion" or "Certificate of Attendance"

ACCET Standards of Accreditation Used…

- The following Accrediting Council of Continuing Education and Training Standards of Accreditation were used to guide the development of the BTSD's Course Certification Protocol (www.accet.org):
  - ✓ Standard IV: Curriculum Design and Development
  - ✓ Standard V: Instructional Delivery and Resources
  - ✓ Standard VI: Qualifications and Supervision of Instructional Personnel
  - ✓ Standard VII: Admissions and Student Services
  - ✓ Standard VIII: Student Assessment and Achievement
  - ✓ Standard IX: Institutional Effectiveness.

ADDIE Instructional Design Model Used…

- The purpose of instructional design is to give learning participants what they need, when they need it, and in a form, they can readily assimilate and use. For many decades, the prevailing model of instructional design has been the systems model known as the ADDIE Model:

  o **Analysis** of the gap between what participants currently know, and what they need to know.

  o **Design** of a learning intervention to bridge the learning gap.

  o **Development** of learning materials according to the design.

  o **Implementation** (aka Delivery) of training program and materials developed.

  o **Evaluation** of the implementation.
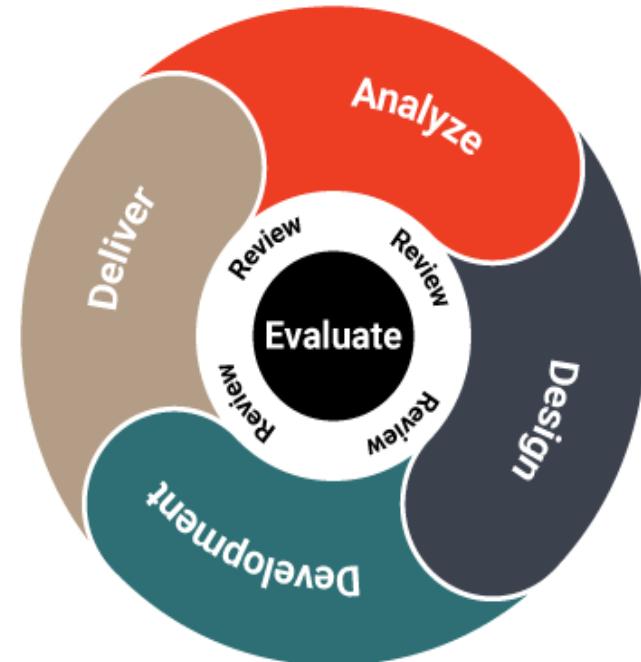
A Training of Trainers Program was provided

- Composed of four courses:
  - ✓ Course #1: Instructional Systems Design
  - ✓ Course #2: Course Design and Development
  - ✓ Course #3: Test Writing Workhop
  - ✓ Course #4: Presentation and Facilitation Skills
- Eleven BTSD Instructors supported designing, developing, delivering and evaluating three (3) blended e-Learning courses.

*(Go to the "Other Reference Material section of the Moodle Workshop" to see the <u>Training of Trainers Program</u>)*

Training of Trainers, continued

- The BTSD Instructors prepared all e-Learning course materials:
  - Learning Design Worksheet
  - Participant Guide, Exercises and Quizzes
  - Examination Questions
  - Examination Pass Score
  - Instructors Guide (Exercise, Quiz and Examination Answers).

The Kirkpatrick Model of Evaluation was used…
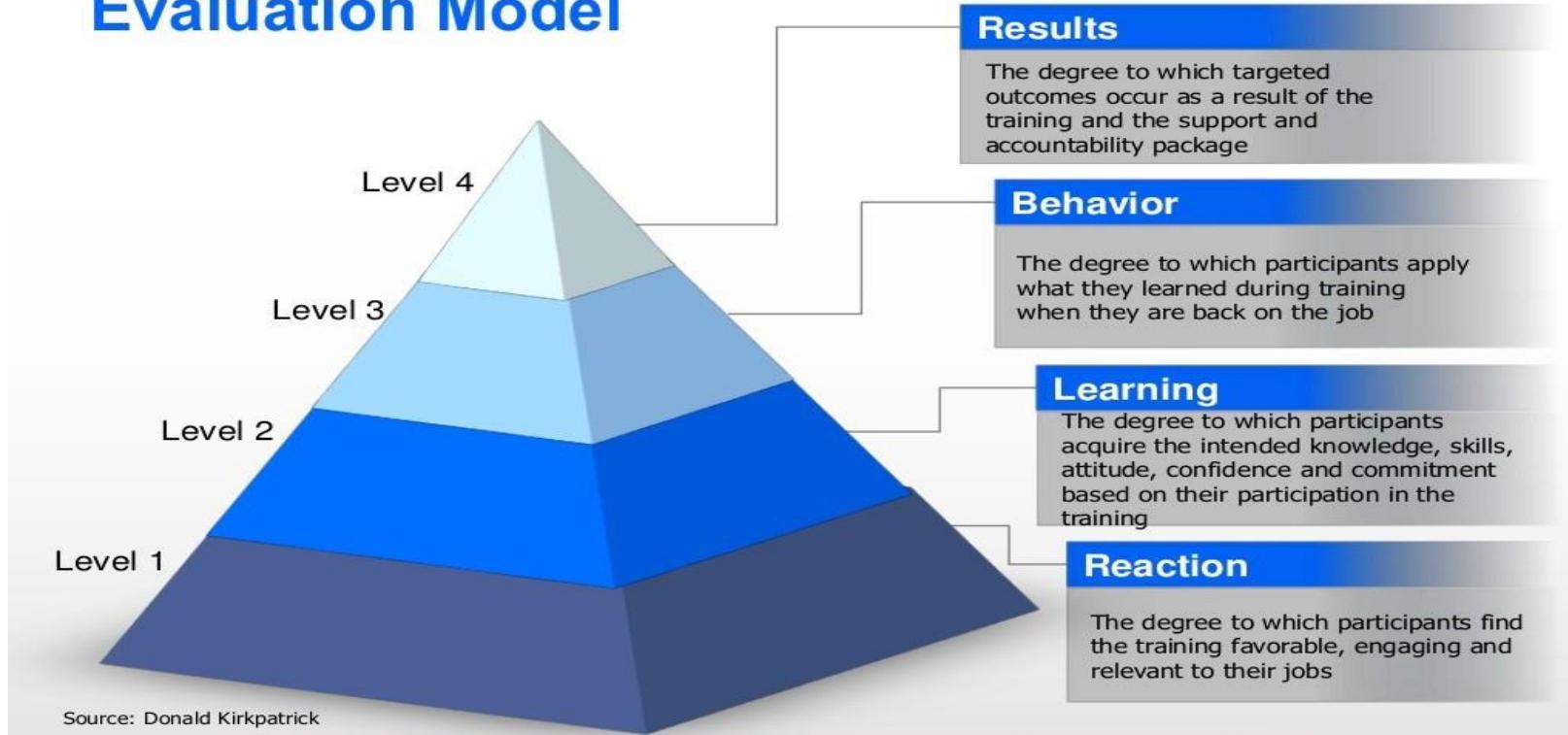
BTSD Evaluation Protocol

- **Level 1: Reaction (measure trainee reactions)** – e-Course Evaluation and Classroom Evaluation Forms were provided to the BTSD.
- **Level 2: Learning (assessment of trainee learning)** – All courses included a Pre and Post-Course Examinations which will capture trainee learning before and after the e-Course.
- **Level 3: Behavior (evaluation of trainee's behavior back on the job)** – A Retention Survey and Guidelines were provided to the BTSD. This form measures the amount of learning retention three months after the e-Course.

BTSD Evaluation Protocol, continued

- **Level 4: Results (measure the results produced from training)** – A Training Application and Value Matrix (TAVM) was provided to the BTSD. This document was created to provide a standardized way for Training Departments or Units to measure the impact of each course on the participant and the organization.

  Go to the "Other Reference Material section of the Moodle Workshop" to see all the training evaluation forms.

Phase 500: Summative Report

Belize Tax Service Department

Phase 500: Summative Report

500 Summative Report (P5)
501 Draft and submit Summative Report
502 Validate Summative report
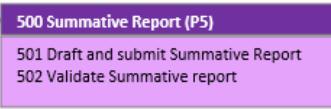
- First BTSD e-Course completed on December 9, 2022:
  - Level 1: e-Course Evaluation Results
  - Level 2: Pre and Post-Course Results
  - Level 4: Training Application and Value Matrix results
- Phase 500: Summative Report submitted on December 16, 2022.
- HRSP Project completed on December 30, 2022.

HRSP Project Results, Deliverables and Impact

Belize Tax Service Department

Key Results

- A competency driven assessment of 200 BTSD employees was conducted for four job profiles:
  - Audit Inspector (61 BTSD personnel)
  - Tax Collector (19 BTSD personnel)
  - Taxpayer Services Inspector (28 BTSD personnel)
  - Non-Tax Personnel (92 BTSD personnel).
- The identification of training programs to reduce gaps between the identified skills and job profile requirements (BTSD Training Plan – 105 courses):

Key Results, continued

- – Audit Training (28 courses)
- – Tax Collection Training (32 courses)
- – Taxpayer Services Training (16 courses)
- – Essential, Soft Skills and IT Training (16 courses)
- – Management Skill Training and Training of Trainers (13 courses).
- The development and implementation of three (3) e-Course programs:
  - – Course #1: Managing for Results
  - – Course #2: Conducting and Closing the Audit
  - – Course #3: Tax Administration and Procedure Act.

Key Results, continued

- The acquisition, implementation and licensing of a Moodle eLearning platform for the BTSD.
- MOECST approval of a procedure to provide certification of training (BTSD Course Certification Protocol).
- A four level evaluation method based on Kirkpatrick's Model of Evaluation, BTSD Evaluation Protocol.

Deliverables

- The contractual deliverables included:
  - Phase 100: Framing Report, December 7, 2022
    - Stand-Alone Report WBS 114 Literature Review and 115 Desk Audit, September 8, 2022.
  - Phase 200: Assessment Report, May 9, 2022
    - Stand-Alone Report WBS 253 Cost Estimation Model, April 8, 2022.
    - Stand-Alone Report WBS 211 Job Profiles, September 8, 2022.

Deliverables, continued

- Phase 300: eLearning Platform,
  - SWOT Analysis, February 21, 2022.
  - Moodle Platform accepted, May 23, 2022.
- Phase 400: Execution, Certification and Accreditation
  - Three (3) BTSD e-Courses designed and developed, July 28 to December 30, 2022:
    - e-Course #1: Managing for Results
    - e-Course #2: Conducting and Closing the Audit
    - e-Course #3: Tax Administration and Procedures Act - Basic Principles and Requirements.

Deliverables, continued

- Phase 400: Execution, Certification and Accreditation, continued
  - First BTSD e-Course delivered November 21, 2022 to December 9, 2022.
  - BTSD Course Certification Protocol approved by MOECST, September 19, 2022.
  - Accreditation Presentation, BTSD, September 27, 2022.
  - Accreditation Presentation, MOECST, December 6, 2022.
- Phase 500: Summative Report, December 16, 2022.

To see a listing of all HRSP Deliverables, click here

Phase	WBS Activities	Sub-Activities	Completion	Deliverable
Phase 100 Framing				
	110 Framing of Technical Assistance	111 Project Kick off meeting	November 9, 2021	Kick-off Meeting Presentation included in Phase 100 Framing Report
		112 Identify and confirm Advisory Team	November 9, 2021	BTSD Advisory Team: • Mrs. Michelle Longsworth • Mrs. Lisa Clare • Ms. Vilma Broaster • Mr. Gabriel Bol • Ms. Merlene Antonio • Ms. Angela Sanchez
		113 Hold technical and administrative focused meetings	September 8, 2022	Stand-Alone Report WBS 211, 114, 115
		114 Literature Review	September 8, 2022	Stand-Alone Report WBS 211, 114, 115
		115 Desk Audit	September 8, 2022	Stand-Alone Report WBS 211, 114, 115
	120 Development of the Detailed Work Plan	121 Outline methodology for the assessment of BTSD personnel (and HRM)	January 5, 2022	BTSD Competency Profiles: • Audit Inspector • Tax Collector • Taxpayer Services Inspector • Non-Tax Personnel
		122 Outline methodology for the development and implementation of training programs	January 5, 2022	Phase 100 Framing Report
		123 Outline methodology and implementation of e-learning for training	January 5, 2022	Phase 100 Framing Report
		124 Outline methodology for the execution and certification of training	January 5, 2022	Phase 100 Framing Report
	130 Inception Report (Deliverable 1)	131 Draft of the Inception Report	December 10, 2021	Phase 100 Framing Report (Draft)
		132 Finalization of Inception Report	January 5, 2022	Phase 100 Framing Report (Final)

Impact

- As a result of the HRSP Project, the BTSD has:
    - A competency driven needs assessment protocol for four key BTSD job profiles.
    - A BTSD Course Certification Protocol approved by the MOECST.
    - A BTSD Training of Trainers program and 11 trained instructors.
    - A BTSD Moodle eLearning platform and three (3) e-Courses.
    - A BTSD Training Unit that meets or exceeds international training standards.

Thank you!
Questions?

Please contact BTSD's Michael Reneau, Coordinator Training Development

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Belize Tax Service Department