



TRAINING STRATEGY

PROJECT MERIDIAN

Cat Navarro Change Manager
Barry Stevens Project Manager
Jyothi Shankar Senior Instructional
Designer

HOUSING NSW

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Project Meridian Training Strategy

1.0 INTRODUCTION

1.1 DOCUMENT PURPOSE

This document will provide Housing New South Wales project stakeholders an understanding of the training strategy, training content and resources required to develop and deliver training for key users of the project Meridian systems.

This version of the document provides the training plan and strategy for the purpose of GoLive in April 2010.

1.2 SUMMARY

Project Meridian has been established to get staff seamlessly productive in using the system HOMES to complete their duties of serving the low- income population in getting housing. There is a lot of background checking, interviewing and paperwork associated with allotting homes and staff are dealing with vulnerable people and it is essential to train on how to go about their work in an empathetic manner as well as efficiently.

The training will be held in various locations of NSW, some live and some virtual from Oct 2009 to Apr 2010. There may also be some components of e-learning.

2.0 TRAINING SCOPE

How the HNSW staff will be affected by change in technology, systems, processes and procedures in performing their everyday job roles, the knowledge and skills HNSW staff will require to perform various job functions, the type and method of training required to deliver the necessary knowledge, the required training volumes and the location and number of course sessions to be scheduled to satisfy this requirement.

3.0 TRAINING OBJECTIVES

Ultimately, the Project Meridian training team needs to ensure that staff have the ability to learn what is required to use HOMES to support business processes.

The key training objectives that will guide Project Meridian's training approach are:

To train staff how to use HOMES to complete key processes/procedures. Where business processes have undergone considerable change these will also be incorporated into training.

To provide training courses that are job function based rather than role based.

To create instructional material for all processes, procedures and system steps and ensure staff know how to use and access this information.

To provide a training program that encourages consistent practice in the new system yet also minimises time away from work.

To create material that can be used on-demand, during and after the life of the project.

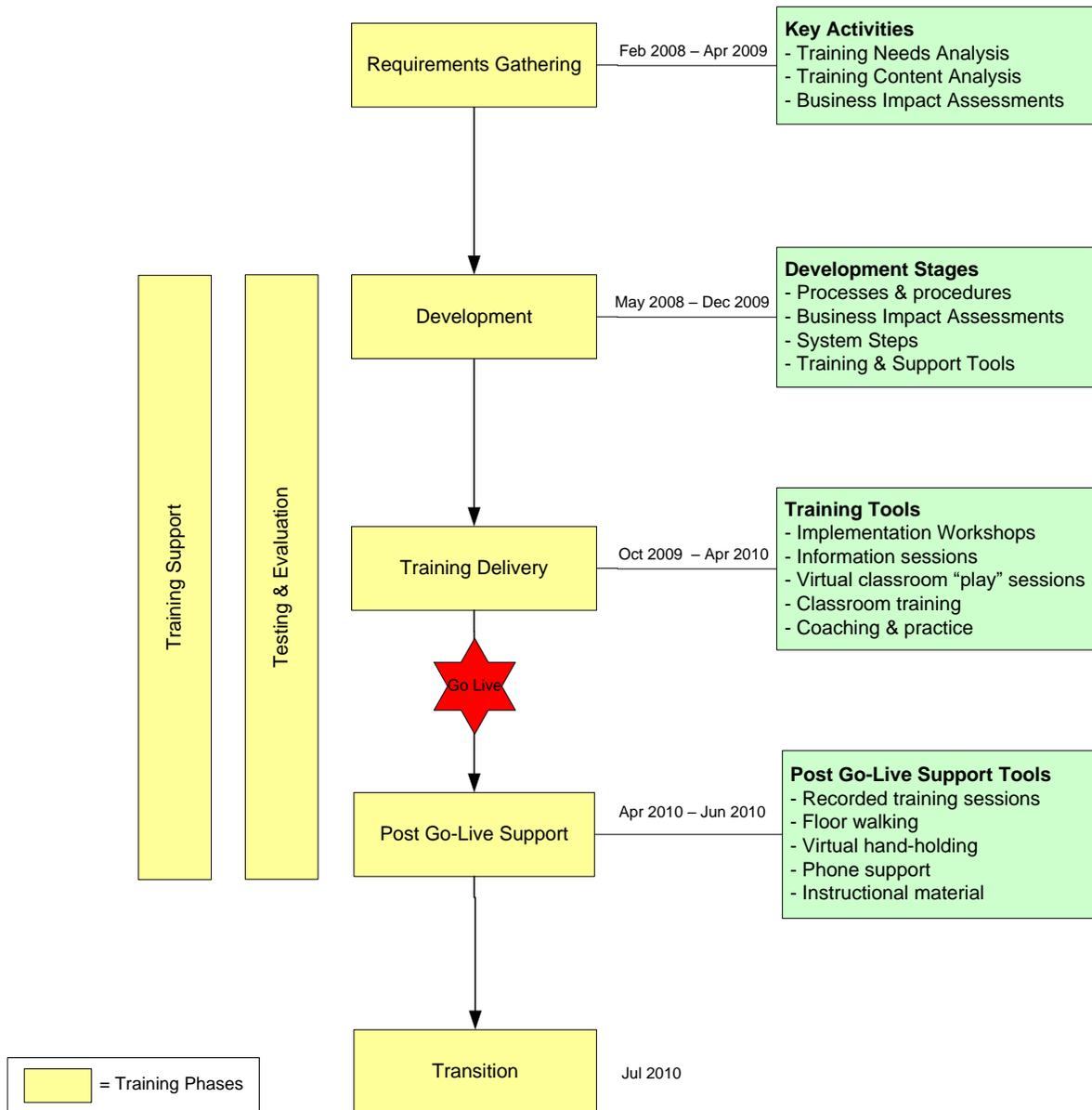
To design a program that maximises staff involvement and hands-on practice. Where possible, students will respond actively to each step. All hands-on training will mimic real life systems and scenarios.

4.0 TRAINING PHASES

The diagram below outlines the major training phases and the timeframes in which they will be completed.

The following sections will explain the tools and activities in each phase.

Project Meridian Training Framework



4.1 REQUIREMENTS GATHERING

4.1.1 Training Needs Analysis (TNA)

In February 2009 the Training Team met with various business representatives across the organisation, ensuring that all relevant roles, divisions and locations were included. A total of 37 meetings were conducted with over 200 people being consulted on their training needs.

The TNA focused on understanding training needs, training challenges and constraints, preferred learning styles and opinions on what had and hadn't worked well in the past. This information was collated and used to prepare a Training Plan.

Below are some of the key findings that were identified as part of the TNA process.

- Multiple training media such as classroom training, e-learning and self-study guides are required.
- Staff need to continuously access the system throughout the training period to ensure they have confidence in its navigation.
- Quality online/context-sensitive help must be available within the new system to complement instructional and training materials.
- Staff with in-depth knowledge of the new system must be easily accessible in the workplace during the early weeks following implementation.
- The business must be consulted in the selection of Change Champions.
- Phone support must be available to all users.
- Support and training staff must be available out of normal office hours to assist staff in the HCC.
- Additional resources may be required to assist with scheduling staff into training.
- Staff can not be pulled away from their role for long durations as this will impact upon productivity and service to clients.

4.1.2 Training Content Analysis (TCA)

In March 2009 the Training Team met again with business representatives across the organisation. Over 22 workshops were conducted involving over 150 business representatives.

The TCA focused on documenting specific tasks related to each role and functional area. These were then related back to business processes and HOMES system steps to identify training content for each functional area.

Whilst the TNA process used an informal group discussion approach, the TCA utilised a more formal small group analysis technique known as DACUM (Designing A CURRICULUM). The DACUM approach involves groups of 8-12 participants who identify tasks and work outputs for a particular role or job. The information gained was documented and sent back to the groups for

review. Following this review the information was analysed and a list of training courses and modules was developed. This list was circulated and reviewed by each Division.

Appendix A lists the courses and modules that will be developed for Housing NSW staff as a result of the TCA process.

4.1.3 Business Impact Assessments (BIA)

In January 2009 the Change Team comprised of Change Management Officers and the Training Team, worked with key Subject Matter Experts, and the Functional Team to review and discuss newly documented business processes. The purpose of each review was to assess whether business processes had changed and if so, assess the impact these changes would have on staff.

A report was prepared for each process summarising the changes and level of impact. These reports were distributed to content owners for their review and endorsement.

Processes with a significant amount of change will be incorporated into training courses.

After completing the review, the only processes which have undergone significant change and will highly impact staff are those that relate to Applications. CSSB is introducing a new application form, screening questions, interview guide, referral process and review process.

The Training Team will work closely with CSSB to develop an appropriate training module that covers business procedures as well as system steps.

4.1.4 Key Challenges

It is important to recognise and document the key challenges for training as they influence the training development and delivery strategies. The key challenges identified in the TNA and TCA processes are:

- Development of training while HOMES is still in development and testing stages.
- Delivery of training soon after the holiday period (Dec/Jan) – some staff may still be on leave
- Last minute changes and updates to training materials as final user interface and modules will not be ready until December 2009.
- Geographical spread of staff in Northern NSW and Southern & Western NSW divisions. This creates logistical challenges for training delivery and could also generate a significant backlog of work if staff were required to travel and be absent from work for training.
- Shortage of suitable training venues. Housing NSW has 11 suitable computer training rooms (over 20 would be required to deliver face-to-face training to staff).

- The potential gap between training and go-live if staff were to receive a single training course. Staff trained in February may forget what they learnt when HOMES goes live in April.
- Change in roles and processes over the next two years due to changes in business strategies and the impact of other projects such as NCM, Child Protection and Stimulus Package.
- Management of expectations regarding the level of competence staff will have when the new system is implemented. At implementation staff will not have the same level of competence they have now with IHS. This may result in a temporary drop in productivity during go-live; however, due to post go-live activities in place and improved features of the new system an overall increase in productivity will eventually be realised.

4.2 DEVELOPMENT

This section describes the deliverables necessary to deliver training. The development phase begins in May 2008 and continues until December 2009 (development may need to go beyond December). This timeframe is a result of the staggered system module delivery.

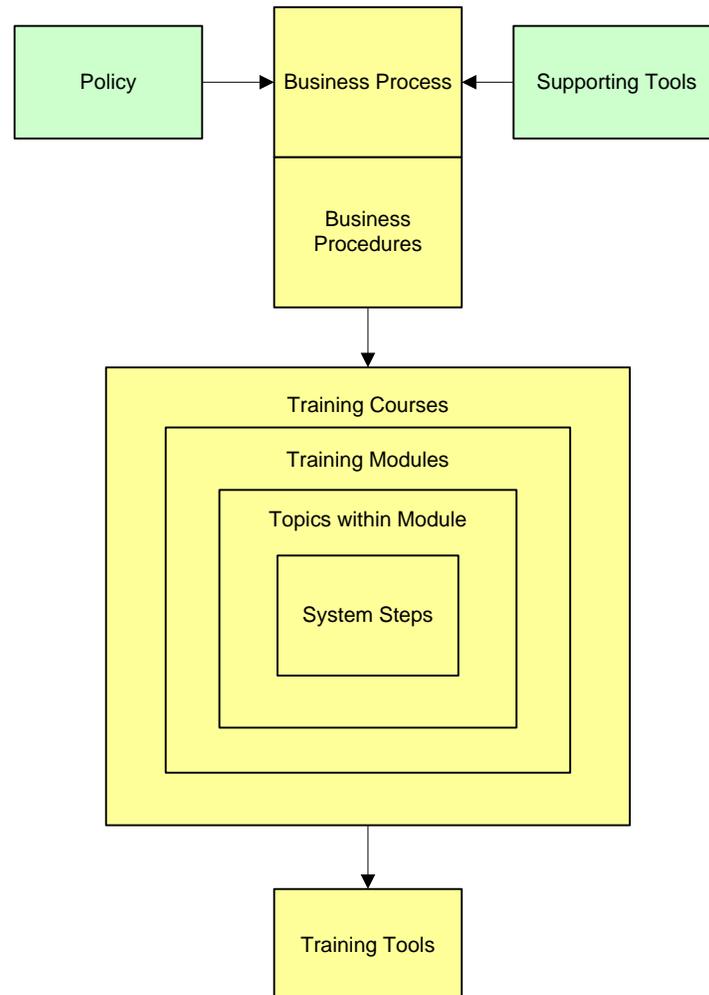
As per the Project Charter, all training deliverables must be reviewed (as a minimum) by:

- Business content owners
- Project Meridian Functional Team
- Project Meridian Project Manager
- Learning and Development
- Director, People and Organisation Performance
- Business representatives, e.g. Change Champions

The various stages within this phase are:

- Business processes and procedures
- System steps
- Courses, modules and topics
- Training tools
- These stages are illustrated in the diagram on the following page.

Training Development Stages



To begin with, the Project Meridian Training Team utilised content within the Business Requirements Specification (BRS) documents to produce an end-user set of business processes and procedures. These were reviewed by the Functional Team and then sent to the content owners for their review and completion. Content owners aligned this documentation to their policy documentation and supporting tools, eg. letters and forms.

Based on the outcomes of activities in the Requirements Gathering Phase (Section 4.1) the Training Team then began developing training courses. The following steps are applied for this stage:

Training developer is allocated a module (e.g. Manage a Tenancy).

Training developer refers to process and procedures, results from the TCA (as documented in Appendix A) and test scenarios developed by the Functional Team to determine the topics that need to be covered in each module (e.g. Record Nuisances & Annoyances, Update Tenancy Details, etc.).

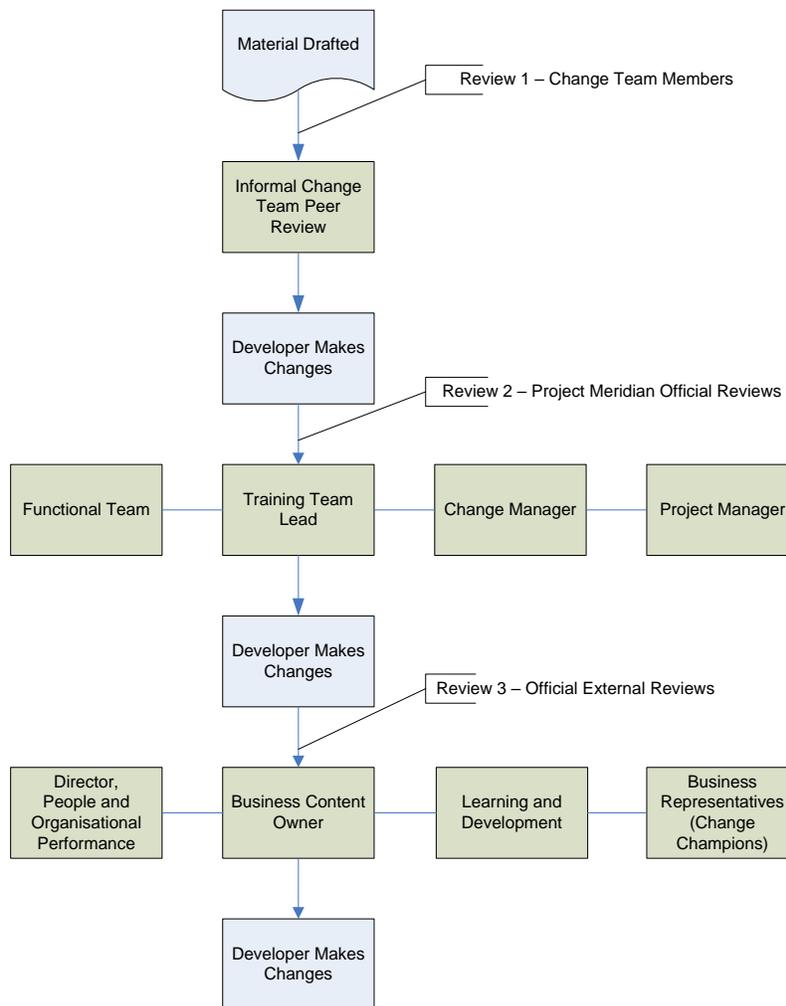
Training developer utilises the Northgate online help to document both the system steps and the system flow. Where required, the online system help is modified (note: actual steps can not be modified, there is a specific *notes* field which is used to add content or include links back to procedural information on the intranet).

Training developer creates scenarios, exercises, assessments, participant/trainer guides and other related material to support the lesson. Any additional data that may need to be created and entered into the training database is captured.

Module is reviewed and signed off (**note**: some modules may need to be revisited due to changes required from UAT, 5.16.1 and 5.17 releases). Refer review diagram below.

Module is tested on a selection of Change Champions and revised where required.

Training modules are then grouped to form courses (e.g. Tenancy Course) and tailored for the various training tools (e.g. face-to-face training, virtual classroom training) which are described in the following section.

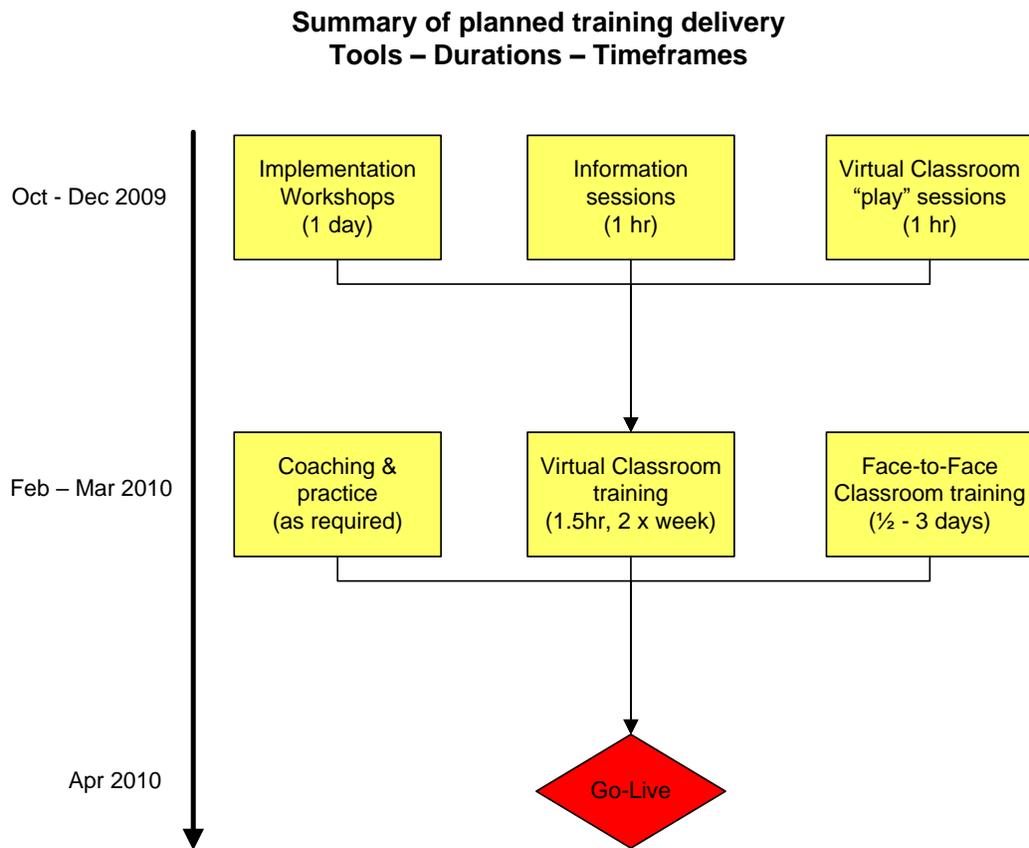


4.3 TRAINING DELIVERY

This section describes the tools that will be used to deliver training to end-users of HOMES. The Project Meridian training approach is based on adult learning principles, outcomes from the Requirements Gathering phase, costs, project timeframes and business constraints.

The combination of all tools is designed to ensure staff gain the necessary skills and knowledge during their initial training and maintain those skills and knowledge until and beyond go-live.

The diagram below presents an overview of training delivery tools (note: training support tools are explained in Section 4.5). These will be detailed in the following sections.



4.3.1 Implementation Workshops

Although nearly all of Housing NSW staff will be affected by the change, Housing Services staff will experience the most change due to their staff numbers, geographic spread and high usage of IHS/HOMES.

To ensure the rollout of HOMES occurs as smoothly as possible, each Housing Services team will take ownership of planned activities and manage the change process for their staff. These responsibilities will rest largely on the Team Leaders.

However, rather than instruct each team on what activities should occur and how they should be managed, each Area will determine this and formulate their own Implementation Plan.

There are two reasons for taking this approach:

Each Division, Area, office and team has its own unique structure, culture and needs. By developing an Implementation Plan specific to a particular Area and tailored to the needs of those staff rather than a one-size-fits-all approach, it is more likely to be successful.

In allowing Team Leaders to have a say in how HOMES activities will be managed and implemented and dedicating time for this to occur, they will be more likely to take ownership of it.

To facilitate this process, Implementation Workshops will be held within each Area in November and will be a full day in duration. Workshops will be run by the Project Meridian Change Manager and a Trainer and will focus on:

- A recap of some of the upcoming training activities and timeframes, and how these will impact staff
- Some of the changes that will be introduced as a result of the new Applications process (note: this component will take up to two hours and will be managed by the AAU).

Decisions will be made on key project elements such as:

- Role of the Change Champions
- How staff will be scheduled for training and how changes to the training schedule will be managed
- How each office will be set up to manage distractions and minimise noise during training
- Process for tracking training attendance and managing non-attendance
- How coaching and/or practice will take place within each office
- Staff that require additional HOMES training
- Post go-live support procedures
- Identifying part-time staff and those with special needs
- Addressing challenges and providing solutions.

Prior to the workshops (at the scheduled September DEM briefings) Area Directors will receive a kit containing a list of items to be discussed and decided at the workshop. The General Manager will be consulted prior to this briefing to ensure their requirements are captured.

During the actual workshop, the Meridian Project Officer will take note of each decision. This will then be developed into an Area Implementation Plan, reviewed by the General Manager and sent back to the Area for their use. The Change Manager will set up a process with Area Directors to track progress on the plan. General Managers will also be required to assist in tracking progress of these plans.

Whilst participants at the Implementation Workshops will predominately be the Area Executive Teams, it is also suggested that the following staff attend:

- Divisional Change Manager
- Divisional Trainer

Divisional Change Managers will assist in scheduling these workshops. It is intended that each Division schedule their workshops in the same week to minimise travel costs (particularly as Information Sessions will be scheduled at the same time, refer to the next Section).

Implementation Workshops will also be scheduled within the HCC.

4.3.2 Information sessions

For many staff this is the first face-to-face exposure to Project Meridian and the information sessions will focus on:

- an overview of HOMES and its features
- upcoming activities and timeframes
- key business processes (to be managed by AAU)
- an opportunity to ask questions

Sessions will be run at the same time as Implementation Workshops and scheduled in the same manner, thereby minimising travel costs. It is intended to visit all sites.

Sessions will be conducted by the Project Meridian Change Officer and supported by the Change Champions. The Change Officer will also use this opportunity to talk in detail with the Change Champions about their role and thoughts on activities to date.

The Project Meridian Functional Team and content owners will be required to respond to detailed questions (that the Change Officer may not be able to answer) within the day.

Given the high impact of changes within the Applications space it would be beneficial for an AAU representative to attend to explain these changes.

Information Sessions will also be scheduled at all Housing NSW locations as well as Businesslink and St George offices.

4.3.3 Virtual Classroom “play” sessions

Virtual Classroom technology will be used to deliver training to staff within the four Housing Services Divisions (described in following section). As this is a relatively new concept some training is required, not only so staff learn how to use the technology but so they are also comfortable engaging and learning within the virtual environment.

Play sessions will be designed to build this level of comfort and will focus on teaching staff how to:

- log on to the technology and general trouble shooting
- communicate and listen effectively in a virtual environment
- use the virtual classroom features (e.g. break out rooms, raising of hands, polls, application sharing, etc.)

Most importantly, the objective is to have staff accept the technology as an effective means of classroom training and develop a degree of familiarity so they are ready to learn during HOMES training.

Client Service staff will need to participate in approximately three 1-hour sessions between October and December 2009. Sessions will be run by the Project Meridian Training Team. Project Meridian will work with GMs and Divisional Change Managers to agree on the best method of scheduling these.

Selected HCC and CSSB staff may also be required to participate in these sessions.

4.3.4 Classroom training

4.3.4.1 *Virtual Classroom Training (Housing Services Divisions)*

Virtual Classroom technology will be used to deliver training to staff within the four Housing Services Divisions. Twenty places will also be offered to CSSB staff (as outlined in Appendix A) and some HCC staff may also participate in some sessions.

Virtual classroom training is interactive, real-time classroom training delivered over the network. Participants can hear the trainer and other participants and take part in an interactive class (though they will not be able to see each other). Trainers will lead the class from various locations. Participants will log on in their own office and join the class. Headsets with microphones will be supplied.

Some of the key features of a virtual class are:

- Trainers will be able to demonstrate HOMES, show presentations and link to the intranet
- Presentations are shown on a *virtual* whiteboard; participants can post notes to it and *virtually* draw on it
- A poll can be taken with online multiple choice or true/false questions
- A chat function allows participants to respond to the trainer
- Icons such as ‘smiley faces’, ‘confused face’, etc. allow the trainer to know what is going on in the class
- Participants can *virtually* put their hand up to ask questions and trainers can mute the class so everyone can hear the answer
- Trainers can split the class into groups in virtual rooms to practice tasks and can *virtually* enter each room to supervise and assist
- Trainers can run tests and record results to monitor learning progress

Each staff member will participate in two 1.5 hour virtual sessions each week, for the nine week training period (Feb–Mar 2010). There will be a range of timeslots offered throughout each day.

For example, in the sample week below, a staff member would need to undertake one *Topic A* session and one *Topic B* session. For each timeslot there are 5 classes running.

	Mon	Tue	Wed	Thu	Fri
8 – 9.30am	Topic A 5 classes	Topic A 5 classes	Topic A 5 classes	Topic B 5 classes	Topic B 5 classes
10 – 11.30am	Topic A 5 classes	Topic A 5 classes	Topic A 5 classes	Topic B 5 classes	Topic B 5 classes
12 – 1.30pm	Topic A 5 classes	Topic A 5 classes	Topic B 5 classes	Topic B 5 classes	Topic B 5 classes
2 – 3.30pm	Topic A 5 classes	Topic A 5 classes	Topic B 5 classes	Topic B 5 classes	Topic B 5 classes
4 – 5.30pm	Topic A 5 classes	Topic A 5 classes	Meetings	Topic B 5 classes	Topic B 5 classes

Each class will have up to 25 participants (located in any office), a HOMES trainer and a HOMES moderator (to assist in managing the virtual class). Some Areas may elect to have their teams

scheduled at the same time (to minimise disruptions) whilst others may elect to schedule staff based on their learning pace.

After evaluating a range of training options, this form of technology was considered the most effective, primarily because staff will not be taken away from work for three consecutive days (as would be the case for face-to-face training) which would impact upon service to clients and generate a back-log of work.

By spreading classes across the training period, staff will be continuously exposed to HOMES until go-live. This will greatly improve their comfort in system navigation and allow them to retain skills learnt (face-to-face training would entail some staff training in February but not receiving HOMES until April).

Additionally, staff will find it easier to absorb shorter lessons rather than a three day course. The risk that staff lose concentration or are overwhelmed by training content is significantly reduced. Emergency absences can also be catered for more easily. There will be some capacity to schedule staff into other sessions or, if this is not possible, all sessions will be recorded and stored so they can be accessed by all Housing NSW staff.

4.3.4.2 Virtual Classroom Proof of Concept

In April 2009 the Project Meridian Change Team and Businesslink commenced a tender process to source a virtual classroom provider. As part of the tender evaluation process a Proof of Concept (PoC) was conducted with the shortlisted vendor. The PoC had two objectives:

To test the performance (audio quality, stability, connectivity, etc.) of the virtual classroom solution on Housing NSW's current infrastructure and determine whether infrastructure enhancements are required to support the solution.

To assess staff reactions to the technology and whether it is perceived as an effective training tool.

The PoC was conducted on the 14th July and involved 120 participants across each Housing Services office. The results are recorded in Appendix B.

In summary, the PoC was considered a success. It revealed that without infrastructure enhancements, the virtual classroom solution could be implemented with satisfactory performance. The only sites that recorded an unsatisfactory performance level were sites with 250K connections. The possibility of upgrading these sites will be discussed with Businesslink and the corresponding General Managers.

All participants responded positively to the technology, finding it both intuitive and an effective tool to use in the training of HOMES.

4.3.4.2 *Face-to-Face Training (HCC)*

Staff within the HCC will also require a great deal of HOMES training; however, their environment and the type of training required differs to that of other Housing Services divisions. The differences to note are:

- Staff work in a 24/7 environment
- There are fewer staff, all located in Liverpool
- No more than six staff can be taken off the phones at any one time

Although virtual classroom technology may be offered to some staff (e.g. night staff, those who miss out on face-to-face training etc), it will not be used to train all staff. The HCC requires different and more specific training and face-to-face training was therefore considered the most appropriate method to deliver HOMES training.

Each week (over the nine week training period) a range of classes will be held and relevant staff will be taken off the phones in small groups to receive the training they require.

The Project Meridian Training Team has worked closely with the HCC to determine the specific training HCC staff will need. This is documented in Appendix C. The Training Team will continue to work closely with the HCC to finalise an effective and suitable training schedule.

4.3.4.3 *Face-to-Face Training (other)*

All other staff will receive face-to-face training at Ashfield, except for Businesslink staff who, at this stage, will receive training in their Liverpool training rooms.

HOMES users within this category require either specific short, tailored courses, or the half day HOMES Basics training (overview, enquiries, etc.). As this group is fewer in number, requires less training and is generally located in the one area, they can all be trained during the six weeks prior to go-live. Appendix A details the training offered to these groups.

4.3.4.4 *Scheduling*

Project Meridian will work with Learning & Development to assess what tools can be used to assist in scheduling staff for training and tracking completion. In addition to or in lieu of this, Project Meridian will provide all Divisions with templates they can use to schedule staff.

Scheduling for HOMES training is likely to commence in November 2009.

The implementation workshops will discuss scheduling and will also confirm how changes to the schedule will be managed.

4.3.4.5 *Additional Training*

It may not be possible to provide all staff with the HOMES training they require during the nine week training period. For example, some Tenancy staff within Housing Services may require some Access & Demand training. Additional training will be identified through Implementation Workshops and other meetings and a number of modules will be offered during the post go-live support period.

4.3.5 Coaching & Practice

A HOMES sandpit (with scrambled client data) will be made available to staff. This will provide the opportunity to practice and cement the skills learnt in training. Staff can utilise the participant guides to run through scenarios or can practice their own steps.

To avoid performance issues, access to the sandpit will be limited to 200 users at any given time. A plan for sandpit use will be decided at each Implementation Workshop.

Throughout the training period it may be identified that some staff require additional coaching. There are a variety of methods that can be used to provide this:

- Trainers may have some capacity to coach smaller groups outside of training
- Change Champions may be able to provide some one-on-one assistance to colleagues in their office
- Staff requiring extra coaching can access recorded sessions and instructional material and utilise the sandpit to practice in those difficult areas
- Post go-live live there will be opportunities to run refresher courses

At the implementation workshops, each area will decide how to identify staff who require additional coaching and how coaching will be provided.

4.4 POST GO-LIVE SUPPORT

Regardless of the amount of training received prior to go-live; users will still require a level of handholding and support post go-live. Learning to use a new system and apply new business processes is manageable in a classroom environment, but having to recall those skills when faced with the pressures of day-to-day work is much more difficult.

This section describes the tools that will be used to support users during the three months post go-live.

Note: A Post Go-Live Support Plan will be prepared by November 2009. The sections below are intended as an outline only.

4.4.1 Recorded Training Sessions

Each 1.5 hour virtual session will be recorded and stored on the virtual classroom servers. These can be viewed on-demand by any staff member, regardless of whether they received virtual classroom training or not, and are an effective tool to refresh what was covered in the classes or to help train new staff. A link will be made available on the Housing NSW intranet site taking users to this server.

4.4.2 Floor Walking

Project Meridian will work with senior managers and Divisional Change Managers to identify key traffic sites. During the first week of go-live, Project Meridian staff will be situated at these sites (where possible) to offer some one-on-one assistance. Floor walkers will also assist in identifying issues or areas that require re-training. This information will be referred to the Project Meridian Change Manager and Training Team Lead for action.

4.4.3 Virtual Hand-Holding

HOMES Trainers will be able to utilise virtual classroom technology to offer additional support, coaching or training as required. Change Champions, Floor Walkers and Team Leaders will play a key role in identifying additional training needs during the post go-live period. The process for managing this will be discussed and determined during the Implementation Workshops.

4.4.4 Phone Support

During and post go-live, staff will require alternative mechanisms whereby they can be led through those system steps and business processes they are still unsure of and receive answers to specific questions. This will be achieved through phone support.

At this stage, the intention is to continue with existing phone support procedures (Businesslink Service Centre, Application Support Group and CSSB/Asset hotline); however, Project Meridian will need to support the Application Support Group to help with the volume of HOMES questions that will be received, particularly in the first four weeks after go-live.

Details of how this will work are still being finalised and are part of the overall HOMES Support Transition plan.

4.4.5 Instructional Material

To supplement training tools and provide additional support to users and those supporting users, some instructional material will be produced. This will include the following:

- Business processes/procedures– these are documented during the development phase and will be organised and stored on the intranet. In May 2009 a company specialising in online usability was engaged to work with business users in grouping processes into logical headings and redesigning the layout and structure of the Clients & Assets page on the intranet. The outcomes of this project can be found in Appendix D. The Project Meridian Training Team will develop a training module that teaches staff how to use process maps and find information on the intranet.
- HOMES system steps – historically these have been stored on the intranet; however, they will now be stored within HOMES itself. HOMES has an improved online help tool that is content sensitive and allows for easy navigation and searching. Staff needing to recall how to complete a task in the system can press the help button and be taken direct to the steps. The online help will also have links to the relevant policy/process on the intranet.
- Quick Reference Guides – these will be available online and will also be distributed to offices. They will provide staff with quick instructions on how to complete key system steps. They will be developed and printed in-house.
- Go-Live Page – a one page sheet of paper explaining implementation activities and support tools available will be developed and distributed to staff through the Change Champions.

4.5 Training support

A range of tools is required to support and supplement the training and post go-live support phases. These are outlined below.

4.5.1 Change Champions

Each office/area has at least one Change Champion. The overall intention with Change Champions is to provide them with as much knowledge and practice as possible, so that they are then in a position to support their office/area in the most appropriate way. Change Champions are managed by the Project Meridian Change Officer.

Change Champions will:

- Receive regular project updates
- Review/test training materials and be involved in pilots
- Receive additional training
- Receive early and more exposure to HOMES
- Be regularly consulted for advice

Change champions will be required to:

- Distribute communications throughout their office/area

- Participate in review/testing activities and some training
- Feed back issues to the Change Team
- Determine the best way they can support their colleagues in the implementation of HOMES. This may include:
 - Floor walking
 - Providing additional coaching
 - Running practice sessions in the sandpit
 - Assessing learning progress and keeping the Change Team informed
 - Encouraging participants and assisting them with training

Three key principles are being applied to the management of HOMES Change Champions:

Change Champions have ownership of their role and it is up to them and their supervisors to decide how they can best support their areas. Each office environment/team is different so there is no one approach that can be applied to all Change Champions. In taking ownership of their role they will be more committed to it and won't be forced to do anything they don't feel comfortable doing or that they feel is ineffective.

Change Champions will be engaged frequently but not to the extent that it consumes a lot of their time. By giving Change Champions small but regular tasks we can maintain enthusiasm and interest but not interfere with work.

Apply a personal element. Change Champions should be acknowledged for their efforts, particularly as the work they will be asked to do is in addition to their regular work. For this reason, much of the documentation sent out from Project Meridian will be personalised and the Change Team will take time to get to know each one. To date, all Change Champions have received their own personal folder with their name on it and the enclosed documents which will enable them to store all future communications. These have been received very positively.

Change Champions are divided into the following groups:

- Corporate Change Champions
- Housing Services Divisional Change Champions (GWSD, CSD, NNSWD, SWD)
- HCC Change Champions
- Content Owner Change Champions (Assets, CSSB)
- External Change Champions (Businesslink, St George)

Each group has different characteristics, tasks and level of involvement. The current number of Change Champions stands at:

Group	No.
Corporate	12
Housing Services Divisions	154

HCC	6
Content Owners	19
External	4
Total	195

A Change Champion Plan itemising and scheduling their involvement is currently being finalised.

4.5.2 Participant Support

During the training period staff may require assistance with the following:

- Confirming training details
- Swapping training classes
- Logging on to the virtual class
- Adjusting headsets and/or audio trouble-shooting
- Seeking further information about HOMES (as follow-up to training)

A Meridian Hotline will be established for these purposes and processes for accessing the hotline will be communicated to staff well ahead of training. This Hotline will be manned by the Project Meridian Change Team; however, support is required from each of the functional streams (to provide timely answers to questions on HOMES).

Note: This Hotline will not be used to provide support during the post go-live support period. HOMES Support will be channelled through the Businesslink Service Centre (as outlined in the previous section) so that calls can be monitored and actioned accordingly.

4.5.3 Trainer Support

For the duration of the project, the Project Meridian Training Team will rely on other teams/areas in order to develop and deliver a quality training program. For example, as a result of configuration and testing work, the Meridian Functional Team has very specific and detailed knowledge of HOMES that the Training Team does not have. In particular, many of the HOMES trainers will be brought into the project in December 2009, and although they will have business knowledge they will be new to HOMES and will be unable to acquire the level of knowledge the Functional Team possesses.

For this reason, the following support is required:

Current day – Jan 10

- Functional Team and content owners to review training modules as they are developed and provide assistance as required Dec 09 – Jan 10
- Functional Team available to assist in training HOMES trainers as required

Feb – Mar 10

- A member of each functional stream available on-call to answer questions that arise from each training class
- Content owners to act as moderators and partner with virtual classroom trainers. Their role will be to help manage the class (monitoring audio, etc.) and answer business related questions. Through this involvement, content owners will also develop an in-depth knowledge of HOMES.

Apr – Jun 10

- A member of each functional stream and content owners available on-call to answer questions and assist in support
- Where possible, functional staff to assist in floor walking
- The Change Manager will work closely with the Project Manager and content owners to coordinate and schedule these resources.

4.5.4 Technical Support

The delivery of HOMES training strongly depends on a range of technologies. Any failure in technology during the training delivery phase would seriously impact the ability for Project Meridian to deliver training to staff.

For this reason, on-call support during Feb-Mar 10 is required. This support would cover network, training databases, training computers and virtual classroom technology.

The Change Team will work closely with Businesslink to prepare a work request for this support.

4.6 TESTING & EVALUATION

4.6.1 Training Outcomes

The following training outcomes are required:

Learning – users need to have used and learnt from the training tools. They need to know how to apply what they have learnt to their job.

Behavioural shift – users need to apply what they have learnt to their job and maintain this practice.

Benefits – business needs to support new behaviours (through policy, future training, procedures, leadership, culture, etc.) to ensure benefits are realised.

The first outcome should be achieved as training progresses and will continue post go-live. This is the responsibility of both the Project Meridian Change Team and the business. Project Meridian must develop and deliver tools that enable users to learn and then put into practice what they have learnt. Business managers must support staff, make time available for training and track performance. Individuals must also take responsibility for their learning and ensure they dedicate themselves to lessons/practice and seek assistance where required.

The second and third outcomes are achieved post go-live and are the responsibility of the business. Team Leaders must ensure they begin and continue to apply what was learnt in training to their job. Business Managers must ensure that overarching policies, practices and culture support the changes so that benefits can be realised (details of this outcome are outlined in the Benefits Management Plan).

The table below shows how training tools will be tested and evaluated to ensure the first outcome is achieved.

Tool being tested	What we are testing/evaluating	How we will test/evaluate
Implementation Workshops	Timing/pace Flow of session Suitability/relevance Effectiveness	<p>Pilot session – Change Manager will work with Divisional Change Managers to agree which Area will be the first to take part in an Implementation Workshop. Area teams will be asked to provide feedback on the workshop.</p> <p>Area Director reports – based on the Area Implementation Plan that is developed after the workshop, Area Directors will be asked to provide progress on the activities/actions they agreed to.</p>
Virtual classroom “play” sessions	Functionality Flow Reactions Completion Technology	<p>Trial – Change Champions will trial all virtual sessions that are implemented to staff.</p> <p>Online survey – survey will track who has completed the play sessions and will also capture feedback on users’ reactions to virtual classroom and the challenges that may need to be addressed.</p>
Training Modules	Content Flow Scenarios Usability	<p>Reviews – there are a number of review stages:</p> <ul style="list-style-type: none"> • Informal Change Team peer review. • Meridian Functional Team, Training Team Lead, Change Manager and Project Manager will concurrently review modules to ensure content is correct. • Content Owners will review modules to ensure they align to business

Tool being tested	What we are testing/evaluating	How we will test/evaluate
		<p>processes and contain relevant scenarios.</p> <ul style="list-style-type: none"> • Learning & Development will review modules to ensure they align to HNSW's corporate learning styles. • Change Champions will review modules to ensure they are clear, relevant and flow correctly.
Classroom training	Training databases Timings Technology Trainers Attendance Effectiveness	<p>Pilot sessions – Each module is reviewed as it is developed (as per previous row). Prior to the commencement of training however, trainers will need to pilot the actual rollout of training (managing the various classes each day, etc.). This will take place in January and will involve the Change Champions. Trainers will hold various sessions a day to practice their skills and this in turn will give the Change Champions additional training.</p> <p>Feedback forms – at the end of training session users will be encouraged to fill out a feedback form. This can be done by means of an online survey at the end of virtual classes, by the same online survey emailed to participants of face-to-face classes, or linked to any online recorded sessions. This allows the Training Team to continuously make improvements to the training and address any issues.</p> <p>Assessments – each session will be assessed. Results will be recorded and monitored by the Change Manager and distributed to the relevant person (to be decided at the Implementation Workshops). Results will indicate attendance, whether an individual is struggling and whether the session needs revising.</p>
Recorded sessions	Quality Performance Technology Relevance/suitability	<p>Reviews – once recorded and stored within the virtual classroom site, a link will be placed on the intranet. Change Champions will be asked to test that they display properly and provide feedback on the quality.</p> <p>Feedback form – next to the link to the sessions on the intranet site there will be a mechanism for staff to provide feedback on the courses.</p>
Instructional material	Content Flow Scenarios Usability	<p>Instructional material will follow the same review process as the training modules.</p> <p>In addition, all documentation that is stored on the new Clients & Assets site will be tested in December. Change Champions will be utilised for this.</p>

4.6.2 Business Readiness

Although the above table shows how each tool will be tested and evaluated, an overarching set of criteria is required that assists in determining the learning progress and whether staff are ready for the change.

This will be done by establishing a Business Readiness Checklist. Towards the end of 2009 the Change Manager will consult with business managers to understand their expectations.

For example, the business may determine that the following is evidence that users have learnt and are ready for the change:

- 90% attendance at classroom training
- 80% “pass” rate during classroom assessments
- X hours spent practicing

When a set of criteria has been established and agreed upon, this will become the Business Readiness Checklist and surveys/tracking tools will be designed to address each criterion.

Business Readiness Assessment will commence in February 2010 when training begins. Each week the Change Manager will review surveys/tracking tools and begin compiling statistics and addressing criteria. Where a division/business area falls behind in the assessment, it will be raised directly with the manager and solutions will be offered (e.g. if some staff miss training they can make up for it via online tools or attend training within another division).

The final Business Readiness Assessment will take place a week prior to go-live. It must be noted that to delay go-live could have serious contractual consequences. This means that if some parts of the business prove “not ready” then this may have to be managed in the post go-live period, possibly through additional training.

It is the Change Manager’s responsibility to continuously assess readiness and report progress to the Training Team Lead, Project Manager and Project Director. Serious issues must then be reported to the relevant management.

4.7 TRANSITION

The Transition phase occurs after the three month post go-live support period and is when project activities and HOMES are handed over to the business and incorporated into business as usual activities.

It has been agreed that Learning & Development will take ownership of the transition of HOMES training (including any ongoing purchase or use of virtual classroom technology).

To support this, Project Meridian will:

- Ensure internal staff become HOMES trainers so that there is knowledge and expertise in the delivery of HOMES training (and virtual classroom technology) within the organisation.
- Ensure all recorded virtual classroom sessions are stored and functioning properly and grouped by functional stream (eg. Tenancy, Assets, etc.).
- Hand over all training files to Learning & Development, including maintenance instructions.
- Provide any additional HOMES training to Learning & Development, Divisional Trainers and content owners.
- Provide any additional virtual classroom training to Learning & Development and content owners.
- Provide any additional documentation training to content owners.
- Provide recommendations for ongoing training and development
- Ensure Change Champions are aware of transition plans and provide them with copies of all instructional materials.
- Provide all relevant stakeholders with a report outlining any corrective action still required.
- Communicate transition details to the organisation.

5.0 RESOURCES REQUIRED

This section describes the resources required for training development and delivery.

5.1 PERSONNEL

Based on an implementation date of April 2010, the resources required to develop and deliver training will include:

- 1 x Change Manager
- 1 x Training Team Lead
- 2 x Project Officers to assist in coordinating and scheduling training and managing Hotline
- x Training Developers (staggered start/end dates, 5 moving into trainer positions)
- 14 Trainers to deliver virtual classroom training to Housing Services Divisional staff. The following breakdown is proposed:
 - 3 x Project Meridian (same personnel as Training Developers)

- 1 x L&D
- 1 x CIO
- 3 x GWSD
- 2 x NNSWD
- 2 x SWD
- 2 x CSD

14 moderators to partner with the virtual classroom HOMES trainers from their own office locations. The following breakdown is proposed (still TBC):

- 10 CSSB
- 4 Assets

2 trainers to deliver face-to-face training to the Housing Contact Centre at Liverpool:

- 1 x Project Meridian (same personnel as Training Developers)
- 1 x HCC

2 trainers to deliver face-to-face training to remaining staff at Ashfield:

- 1 x Project Meridian (same personnel as Training Developers)
- 1 x L&D

The commitment required from all HOMES trainers (not already part of the Meridian team) is as follows:

- 1 – 18 Dec and 11 – 22 Jan for preparation activities (train-the-trainer, coaching, practice, pilots) at Parramatta/Ashfield.
- 25 – 29 Jan for preparation activities (set-up, testing) at their training location.
- Feb – Mar for training delivery which can be conducted from their own office location.
- Apr – June for post go-live support and additional training as required

Moderators will also be required to participate in up to two weeks of moderator training in Jan 10.

5.2 ACCOMMODATION REQUIREMENTS

For the delivery of training the following rooms are required:

- Ashfield computer training room (mid Nov – mid May)
- HCC training room (Jan – mid May)
- Businesslink training room (1-2 weeks in Feb – Mar)

In addition, each virtual classroom trainer and moderators will need access to an office or quiet location to run their training Feb – Mar.

5.3 TECHNICAL REQUIREMENTS

At this stage, technical requirements are as follows:

- Virtual Classroom software to be installed and set up on all HNSW PCs
- All PCs able to access HOMES training and practice databases
- Training and practice database icons on each desktop
- In each training room: projector and screen, whiteboard, phone, 15 participant PCs and 1 trainer PC.
- Dedicated training and practice environment that can support the following:
- Training – up to 20 users during train-the-trainer and up to 170 users during training delivery
- Practice – up to 200 at any given time
- Software required for development: Word, Excel, PowerPoint, Visio, Adobe Captivate, Snagit and Virtual Classroom.

6.0 ROLES & RESPONSIBILITIES

The development and delivery of training depends on input and support from a number of different areas. The table below lists those input and support requirements as well as those responsible for their delivery.

Role	Responsibility
Change Manager	Manage the business relationship. Direct training strategies and outcomes. Provide support and act as escalation point. Conduct Implementation Workshops.
Training Team Lead	Produce and deliver tools and strategies outlined in the Training Plan. Lead team of training developers and trainers.
Training Developer	Develop all course material for Project Meridian as directed by Training Team Lead.
Training Deliverer	Deliver training to stakeholders as directed by Training Team Lead. Provide post go-live support to staff.

Role	Responsibility
Project Officers	Develop schedule and roster for classroom training and floor walkers. Coordinate training rollout (including all logistics) and support trainers in the field. Collate feedback and issues. Manage Change Champions Produce Implementation Plans
Functional Team	Provide advice to the training team as required. Ensure sufficient representatives are available during delivery and support. Review material where required. Act as Floor Walkers during the post go-live period (where possible).
Test Team Lead	Communicate UAT business requirements. Communicate issues identified in testing that impact training.
Technical Manager	Provide training and practice databases. Ensure cutover plans reflects needs of the Change Team.
Project Meridian Management	Support training by ensuring roles and responsibilities outlined in this document are carried out. Review and approve Training Plan.
Northgate	Provide advice and information as required. Ensure online help is delivered with each software release. Provide system and product support while training is delivered. Provide train-the-trainer services to the Training Team.
Change Champions	Distribute information to colleagues. Test and review training materials. Participate in additional training. Participate in regular virtual classroom sessions. Assist colleagues during training and post go-live period.
Businesslink	Provide technical support at required. Provide service proposals as required.
Content owners	Finalise all policies, processes, procedures and supporting materials for publication by Nov 09. Provide input to communications and training development as required. Ensure sufficient representatives are on-call during training delivery and support. Provide phone support to users post go-live. Review and sign off on all training materials as required. Provide training moderators for Housing Services divisional staff.
People & Organisational Performance (incl. Learning & Development)	Review and approve Training Plan. Support and provide assistance to the training team. Manage transition planning for HOMES training.

Role	Responsibility
CIO	Champion project activities. Support training by ensuring roles and responsibilities outlined in this document are carried out. Review and approve Training Plan.
Business Sponsor	Champion project activities. Communicate business' obligations and responsibilities to senior management.
Project Meridian Steering Committee	Champion training activities and ensure training is given operational priority during delivery timeframes. Review and approve deliverables as required.
Business Managers Organisational Change & HR	Assist in coordinating all training tools. Assist in communicating key training information.
Team Leaders and Area Directors	Attend Implementation Workshops and action Implementation Plan. Ensure team members complete all training activities. Ensure team members are supported during delivery and post go-live. Carry out training tasks relating to Project Meridian when requested.
Senior Managers	Champion training activities and encourage commitment from staff. Provide advice and feedback as required. Provide resources as required.

7.0 ASSUMPTIONS AND DEPENDENCIES

ASSUMPTIONS

The training strategy, development and delivery are based on a number of assumptions. These will be regularly reviewed to determine if they are still relevant. The training assumptions are:

- Housing NSW staff have a working knowledge of the current processes and procedures relating to their specific role.
- Staff have knowledge of existing Housing NSW products and services.
- A fully functional and supported training and practice database is available for training and for staff to access in the workplace. This environment must contain sufficient data so that it can be used for training exercises.
- The business will coordinate and allocate resources to assist in scheduling staff into training courses.
- The business will nominate staff to become Change Champions. Change Champions will be confident in using the new system and assist Project Meridian in preparing the business for the changes.

- Content owner representatives will be made available during the training period and will act as moderators for each training session.
- Modules are delivered by Northgate and configured and tested allowing sufficient time for the Training Team to develop and test training content.
- Project Meridian activities are given high priority by Business Managers during training delivery and the post go-live period.

DEPENDENCIES

The dependencies identified include:

- The system and screens are available to training developers during the development phase of training.
- Selected training rooms can be booked and secured for Meridian training.
- Businesslink is able to implement a virtual classroom solution in the required timeframes.
- Any issues or changes identified during UAT impact training must be communicated to the training team immediately. This could be via MQC, the test management tool that provides the documentation for all phases of the application testing process.
- Training databases made available to the training team during the development phase must meet the requirements outlined in the Meridian Landscape Strategy document and Training Plan. The Landscape Strategy outlines system environments, hardware and software resources required by Project Meridian.

8.0 RISKS

The table below outlines the major risks to training and mitigation strategies. Once agreed, these risks will be added to the project Risk Register and managed accordingly.

Risk	Likelihood	Consequence	Risk Rating	Risk Level	Mitigation Strategy	Owner
<p>Training can not cover all key processes and system steps. Staff do not know how to perform all tasks at go-live.</p>	5	3	15	Major	<ul style="list-style-type: none"> Core functionality will be identified and given priority in training. Instructional Material for all modules/functionality will be available online. Post go-live support processes will be made available to all staff. Change Champions will have a good understanding of the instructional material available and where to get assistance. 	<p>Change Manager Training Team Lead</p>
<p>UAT is scheduled to be completed at the same time as training development. Late system changes may not be incorporated into the training</p>	5	3	15	Major	<ul style="list-style-type: none"> Training Team to work closely with the Test Team to ensure any changes are communicated as they are identified Prepare to incorporate changes/revisions during post go-live activities 	<p>Training Team Lead Test Team Lead</p>
<p>Staff do not turn up for training. This could lead to staff not knowing how to complete tasks at go-live.</p>	3	5	15	Major	<ul style="list-style-type: none"> Ensure business managers are aware that they are accountable for their staff and that they understand the impact no-shows will have on productivity and go-live activities. Utilise an LMS to schedule and track training (if available) Recorded virtual classroom sessions to be made available to all staff Implementation Workshops will determine process for managing “no shows” 	<p>Change Manager Training Team Lead Business Sponsor</p>

Risk	Likelihood	Consequence	Risk Rating	Risk Level	Mitigation Strategy	Owner
Proposed training venues are not suitable or available when required	3	5	15	Major	<ul style="list-style-type: none"> Book and inspect venues early Communicate regularly with owners of the proposed location. Identify possible back-up site.. 	Training Team Lead
Suitable LMS is not in place, making it difficult to track training and assess Business Readiness	3	4	12	Major	<ul style="list-style-type: none"> Communicate regularly with LMS project Investigate the current interim LMS and how it may be used as a back-up Ensure Change Team is prepared to manually schedule and track training if required. 	Training Team Lead
Members of the Functional Team (specifically the Business Users) leave the project prior or just after go-live and are not available to support activities.	4	4	16	Major	<ul style="list-style-type: none"> Communicate expectations to Functional Team Leads Implement a 4-weeks notice period so that replacements can be sought and trained Develop Leave Guidelines to ensure delivery is not affected by absences. 	Project Manager Project Director
Other business initiatives are implemented during training delivery, limiting the availability of staff and their capacity to learn.	4	4	16	Major	<ul style="list-style-type: none"> Communicate scheduled activities to Project Management & Change Unit and ensure they are reflected on the corporate change calendar Business Sponsor to communicate importance of training delivery at executive level and ensure no other equally large initiatives are occurring at the same time Spread out training activities and provide staff with multiple learning opportunities 	Change Manager Training Team Lead Business Sponsor

Risk	Likelihood	Consequence	Risk Rating	Risk Level	Mitigation Strategy	Owner
Project Meridian staff are unavailable to review, test or provide input into training development. This may affect the quality, accuracy and effectiveness of training tools.	3	4	9	Moderate	<ul style="list-style-type: none"> • Communicate requirements to Team Leads • Meet regularly with Project Manager to discuss upcoming activities and requirements • Prepare a detailed work plan which outlines when project staff are required. Ensure this is reflected in the Project Plan. 	Change Manager Project Manager
Trainers become ill or resign, impacting the ability to deliver training.	3	4	12	Major	<ul style="list-style-type: none"> • Ensure there are scheduled breaks during training to allows trainers to rest • Implement a 4 weeks' termination notice period • Train other project staff so there is back-up. 	Training Team Lead
New staff that commence with Housing after training but prior to go-live will not have received training.	5	2	10	Moderate	<ul style="list-style-type: none"> • Source trainers internally. Ensure there are sufficient breaks between training so that additional coaching can be offered. • Make available the recorded virtual classroom sessions • Ensure there is comprehensive online help available to staff • Prepare Change Champions so that they are able to offer coaching sessions if required. 	Training Team Lead Change Manager

Risk	Likelihood	Consequence	Risk Rating	Risk Level	Mitigation Strategy	Owner
<p>Capability of Team Leaders – some may not be willing to take on the required responsibility. This could lead to team members not taking part in some training activities.</p>	3	4	12	Major	<ul style="list-style-type: none"> • Engage Team Leaders early • Conduct Implementation Workshops which will allow Team Leaders to make decisions on how activities will be implemented within their area • Ensure General Managers provide support and encouragement to Team Leaders • Ensure there are Change Champions available who can provide support to Team Leaders 	Change Manager
<p>Internet/network fails and access to the virtual classroom is blocked. Training is unable to occur.</p>	3	5	15	Major	<ul style="list-style-type: none"> • Work closely with Businesslink to establish a virtual classroom solution • Ensure there is immediate Businesslink support available during training • Undertake numerous tests/pilot to assess likelihood of risk • Have all virtual classes recorded prior to the commencement of training as a back up. 	Change Manager Training Team Lead Businesslink Project Manager