



# Change Trainer Value Uplift

Lean Six Sigma – Green Belt

Karen Lynley

**DEFINE**



**MEASURE**



**ANALYSE**



**IMPROVE**



**CONTROL**

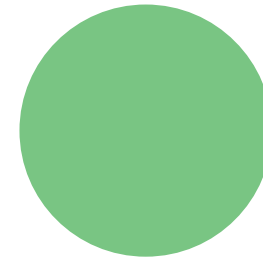


# DEFINE contents

Define



Project Charter  
Defining the problem: What, Where, When, What  
Voice of the Customer  
Stakeholder mapping  
Communication plan  
SIPOC  
Risks and issues



**Project Name:** Change Trainer Value Uplift

**Green Belt Trainee:** Karen Lynley

## Background / Context

Change Trainers may be tasked to work in change projects or initiatives across the business. To ensure that change trainers are invited to do this we need to ensure that what they do is relevant and useful. To meet our strategic priority of being a high performing organisation we are being asked to show the value that change trainers bring to the mahi.

## Problem Statement

Over the past 18 months, the Change Enablement (CE) team at Kāinga Ora has been unable to quantify the value of the 'Change Training' provided. This lack of measurement hinders our ability to assess our contribution to organizational change initiatives and improve our service offerings.

## Project Objectives

- By July 24:
- develop and standardize a method for rating the value of future training engagements by the CE Team.
  - understand the value we bring to projects and identify opportunities for improvement
  - develop and implement prioritized improvements to enhance our overall effectiveness

## Expected Outcomes / Benefits

- Improved service offering by clearly determined measures
- Able to share with the organization the value of the CE trainers
- Reputational uplift
- Help define what is expected from the CE trainers within projects

## Scope

In Scope

- Internal key stakeholders of the Change Enablement team + Change Trainers
- All projects assigned to the Change Enablement team
- Self-serve training within LMS developed by the Change Enablement team
- Any work done to support the project teams

Out of Scope

- Impact of Change Managers
- Training conducted by other teams

## Team

- Karen Lynley
- [Redacted] (Manager of the Team)
- Change Trainers ([Redacted])

## Project Risks

- Risk of project timeline being delayed because of bandwidth
- Risk of data not being available

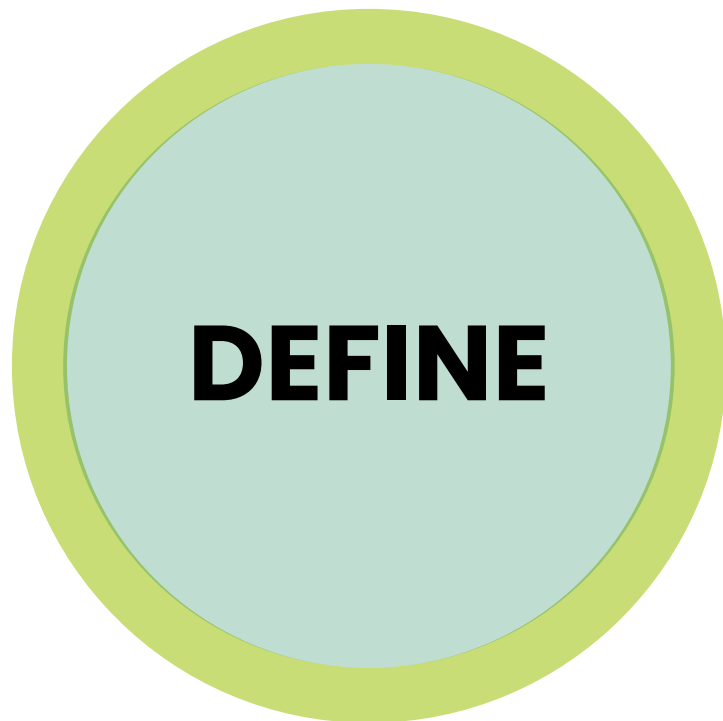
## Timeline

Stage	Start	Finish
Define	18/04/2023	12/05/2023
Measure	8/05/2023	07/10/2023
Analyse	07/10/2023	20/12/2023
Improve	15/01/2024	01/04/2024
Control	01/04/2024	24/06/2024

**Sponsor:** [Redacted]

**Business Group:** Change Enablement

**Coach:** [Redacted]



# DEFINE



## WHAT

We do not know the value that Change Trainers add to a project nor the opportunities to improve the value proposition



## WHERE

Within change initiatives that the Change Trainers have been engaged



## WHEN

In the past 18 months.



## WHAT is the Impact

- Change trainers may not be used by projects as the value of their work is not known.
- We cannot positively impact change projects across the organisation.
- Change Enablement is not able to show return on investment.
- Change processes are viewed negatively, impacting other change

Define



# Voice of the Customer

Define



Voice of the Customer	Key Issue	Measurable Requirement	Critical To Quality
"I had to work through the plan with the Change Trainer, put in the key tasks and dates and go through each part."	"Scale of the project wasn't matched to capability of the trainer, I had to micro-manage the work"	<ul style="list-style-type: none"> <li>• Change Trainer understands key tasks</li> <li>• Trainer has capability to deliver to requirements</li> <li>• Evaluation of trainer</li> </ul>	Trainer feedback has positive sentiment and scores over 4 on the Likert 1-5 scale
"Things were being missed or things were not done on time"	Gaps in work and not meeting deadlines	<ul style="list-style-type: none"> <li>• Order and sequence of tasks</li> <li>• Timeframes for specific tasks OUT OF SCOPE FOR PROJECT</li> </ul>	<ul style="list-style-type: none"> <li>• Presence of a standard process that includes the sequence of required tasks</li> <li>• Delivery of the work to the agreed plan [OUT OF SCOPE FOR THIS PROJECT]</li> </ul>
"Measuring success is hard if you don't say up front what you are going to be evaluating"	Not knowing evaluation criteria or work to be done ahead of time	There is standard evaluation criteria	<ul style="list-style-type: none"> <li>• Presence of evaluation template(s)</li> <li>• Presence of standard processes to capture feedback and evaluations</li> </ul>
"Learners can be fatigued by the time you get to the evaluation stage of a project. If they do respond, they can also evaluate the technical change (e.g. the software upgrade) rather than the training itself"	Difficulty getting evaluations on learning specific to the training	Alternative ways of evaluating Change Trainer work beyond learning evaluations	As above
Someone learning about being a Change Trainer (new to the role), doesn't have a clear description of the work required of them or how to do it	Training resources for Change Training	What tasks are required to be done, what skills are needed and how to learn or develop those skills	<ul style="list-style-type: none"> <li>• Presence of templates</li> <li>• Presence of reference materials on skills/approaches/techniques or methodologies required</li> </ul>

# Stakeholder mapping

Define



## Assessing Stakeholders

Stakeholder	Type	Position	Importance to them	Role / strategy	Need to know
Change Trainers (CTs)	Power   Resource	Undecided	High	Delivery Team	Deliverable guidelines + the level of completion for tasks (What does good look like)? How does the peer review work? How can I lift my skills?
Project Teams	Disinterested	Undecided	Low	No comms	
Change Leadership Team (CLT)	Power	Supporter	High	Sponsors	Level of tasks completed by the CTs How to show the value of the team using metrics
Change Managers (CMs)	Resource	Undecided	High	Consult	That tasks have been completed, that they support the overall CM strategy. How tasks are evaluated How define what might be expected in different size projects Handover points between CMs and CTs
Project Managers (PMs)	Interested Party	Supporter	Med	Customer Consult / Inform	What can I expect from my CT and what work will they do? How does it differ to the work the CMs do? How do I know what quality looks like? How do I know they have the right skill level for this project? What quality of completion to realise the benefits of the project?
Business Analyst Leaders + team	Disinterested	Supporter	Med	No comms	

# Communication plan

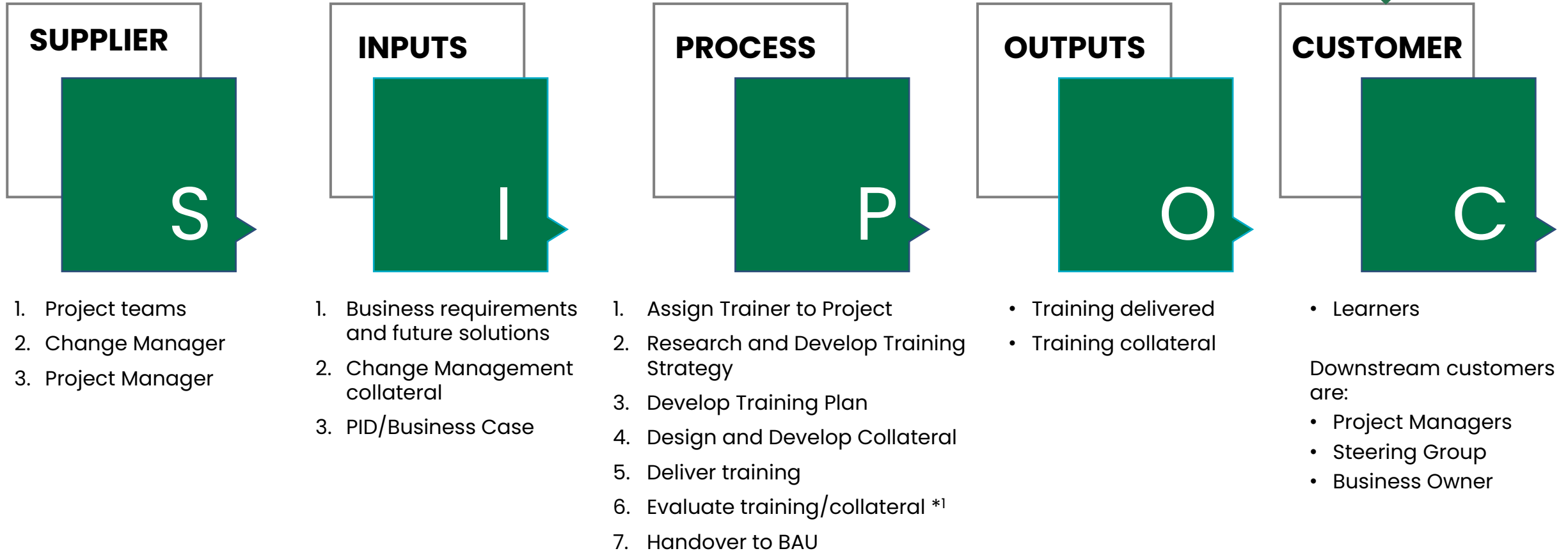
Define



Audience	Objective	Comms	Key messages	When / Frequency	Channel of communication	Assigned
Project Managers (customer)	VoC + build momentum	Consult Inform Inform Inform	Survey current / future state value + effectiveness The value of CT / What good looks like? Difference of CM/CT roles When to engage CT on the project based on project requirements	Measure to assess current state Improve stage during pilot Control stage Sustain gate	Email with links to survey Meetings Email with link Email with link	Karen
Change Managers (CMs)	Endorsement + solution input	Consult Inform Inform Inform	The problem to solve + benefits + WIIFM Insight from survey metrics (i.e. performance of team) Inputs required for the CT The improvements + benefits	Consult as required Inform in monthly team meetings	Meetings to consult	Karen
Change Leadership Team (CLT)	Leverage power	Consult + leverage power	Stage Gates review before next stage can start	5 stages of DMAIC	Stage gate meetings	Karen
Change Trainers (CTs)	Project delivery + control stage standardisation	Consult + delegate tasks	The problem to solve + benefits + WIIFM Deliverables (scope) of CTs engagement Survey questions / evaluation criteria (past+future) Analyse stage Improve + risks / issues to manage The artefacts of the improve stage (e.g. guidelines, what good looks like, peer review steps, matching skills to project types) Control stage rollout and confirm benefits	5 stages of DMAIC	Workshops, regular comms (Teams) meetings and project tasks	Karen

# Current end to end high-level process

Define



\*1 – ad-hoc and infrequent

# Risks and issues for the project

Define



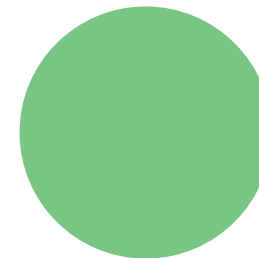
	Risk / issue	Impact	Probability	Residual risk	Mitigation activities
1	May not be able to get reliable historic survey results	High	Issue (100%)	Low	Not able to be altered. Process maturity uplift will be a part of the project. (2) Send out surveys to PMs for VoC data
2	Changing operational model may erode the relevance of the improvements and reduce the size of the team	High	High	High	Maintain a 20:20 focus on process, deliverables, metrics that are agnostic on who does what. Confirm the RACI post changes
3	Infrequent project delivery may make the data insufficient to draw in the improve stage	Med	High	Medium	Run a pilot of 5 engagements and use the findings to decide if this is sufficient to handover to BAU
4	Some or all current state data is a VoC survey rather than real data	Med	High	Low	Process maturity uplift will be a part of the project.
5	High turnover of Change Trainers	High	High	High	As 7
6	Project team or PM may be unavailable due to BAU work	Med	High	Med	Project duration extends with reduced time availability
7	Massive changes to the Operational Model across OI and Kāinga Ora	High	Issue (100%)	High	Handover to BAU before we lose the IP. Ensure the new process are locked and loaded so that the future model continues to use the improved resources

# MEASURE contents

Measure



Research of possible deliverables  
Current state data collection – Plan A  
Plan A – Learner data collection plan  
Plan A – Learner data collection: raw data, totals & reflections  
Plan B – The alternative data collection plan  
Plan B – The survey, results and insights  
Summary of insights  
Maturity levels of Change Training and Maturity assessment



# Possible deliverables

Defining what might be required from a Change Trainer (CT), within a project

Measure



Where there is more than one ✓ this is AND/OR	Training Strategy	Training Plan	Resource Design	Stand Alone Documentation	Standard Documentation
Project Deliverables					
Evaluation plan	✓	•	•	•	•
Measures of success	✓	•	•	•	•
ADDIE design within the project	✓	•	•	•	•
Core Principles of learning	✓	•	•	✓	✓
Prosci and ADKAR methodology links	✓	•	•	•	•
Overarching approach	✓	•	•	✓	•
How training links to Project objectives	✓	•	•	•	•
How training links to Kāinga Ora Strategy	✓	•	•	•	•
SME collaboration process	✓	•	•	•	•
Scope description	✓	•	•	•	•
Review and Approval process	✓	•	•	•	•
Key Deliverables	✓	•	•	•	•
Resource requirements	✓	•	•	•	•
Impacted Audience	✓	✓	•	•	•
Needs Analysis/Skill Gap Analysis	✓	✓	•	✓	•
Dependencies	✓	•	•	•	•
Timeline	✓	✓	•	•	•
Review and analysis of current state	✓	✓	•	•	•
Accessibility & Inclusion Planning	✓	✓	✓	•	✓
Connection to Rautaki Māori	✓	✓	✓	•	✓
Training Calendar/Invitations	✓	✓	•	•	✓
Training Modes	✓	•	•	✓	✓
Selection of Training Modes	•	✓	✓	•	•
Justification of decisions (e.g. for Steering Group)	✓	✓	•	✓	•
Lesson Plans	•	✓	•	•	•
Video Design Brief	•	✓	✓	•	•
Training Communications	•	✓	•	•	•
Learning Objectives	✓	✓	✓	•	•
Learning Outcomes	✓	✓	✓	•	•
Change Champion planning	✓	✓	•	•	•
Train the Trainer plans	✓	✓	✓	•	•
Transition to BAU plan	✓	✓	✓	✓	•
Evaluation report	•	•	•	✓	•
Plan for Learning hub/storage of collateral	✓	✓	•	•	•
Lessons Learnt	•	•	•	✓	•
Draft L&D resource/collateral creation	•	•	✓	•	•
Pulse Check	•	✓	✓	•	•
Jira stories	•	•	•	✓	•

## L&D resources/collateral deliverables

- Design and branding
- Video
- Infographic
- User Guide
- Quick Access Information
- Communications
- Newsletters
- Emails
- Sharepoint authoring
- Yammer articles
- Handover to BAU documentation & recommendations
- Workshops
- One on One coaching
- Buddy/coach/superuser framework
- Drop in sessions
- Online Learning Module
- Reading Pack
- Exemplars
- Best Practice Guidelines
- Demonstration
- Brainstorm
- Pathway of learning
- Curation of existing materials
- Slide packs
- Other/Misc

Learner Evaluations to determine effectiveness of training



# Plan 'A' – Learner Data Collection plan

## Executive summary of Plan 'A'

Plan 'A' was to collate learner evaluations from projects completed in the previous 12 months. The data available was 'patchy' with different collection methods and operational definitions. As a result, an alternative measurement approach was sort.

## The approach for Plan 'A':

1. Collate existing learner evaluation (raw) data, organise and analyse it as best we can.
2. Review the analysis (go / no go)
3. Identify and agree the next steps or alternative approach

It identified that:

- The learner feedback is largely unavailable for change trainer engagements
- The feedback that is available was collected by different methods and rating scales
- 6 Change Trainers left during data collection negating an option to conduct interviews.

Outcome: Plan 'A' analysis confirmed the problem statement that *"Kāinga Ora is unable to quantify the value of the 'Change Training' provided"* and the data is unusable.

Next step: Cut over to an alternative data collection plan

[The next two slides show the Plan 'A' analysis detail]



# Plan 'A' – Learner Data Collection

Collate survey results from the previous 12 months

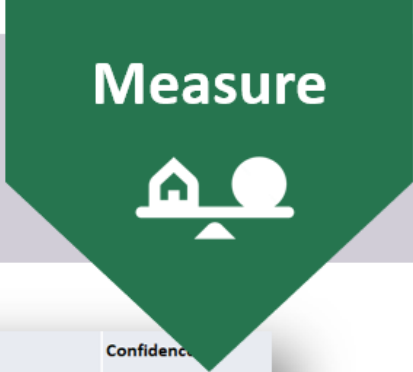
Trainer	Role	Project	Evaluations completed
[Redacted]	Senior Change Trainer	[Redacted]	Yes 3
[Redacted]	Senior Change Trainer	[Redacted]	Yes for one element
[Redacted]	Senior Change Trainer	[Redacted]	Yes for 1 element

Evaluations available from the following trainers

Trainer	Role	Project	Evaluations completed
[Redacted]	Change Trainer	[Redacted]	No learner evaluations completed (confirmed by [Redacted] Change Manager)
[Redacted]	Change Trainer	[Redacted]	None
[Redacted]	Senior Change Trainer	[Redacted]	Nothing for [Redacted] some for [Redacted] yes for [Redacted]
[Redacted]	Change Trainer	[Redacted]	n/a
[Redacted]	Change Trainer	[Redacted]	No for her time on Ara
[Redacted]	Change Trainer	[Redacted]	No for 4
[Redacted]	Senior Change Trainer	[Redacted]	n/a

# Plan 'A' - Learner Data Collection

Raw data



Issue: Data is largely unavailable, data that is available was collected by differing methods and rating scales

Project	Training type	Trainer	Evaluation progress known		Method	Overall Quality	Method	Confidence to start work
	Strengthened testing	Karen Lynley	yes	some comparable data			Rating 1-5	4.5 / 90%
	Training	Karen Lynley	yes		Rating 1-10	8.44 / 84.4	Rating 1-5	4.33 / 86.6%
	Drop in sessions		no					
	Video collateral		no					
	Workshop Updates		yes	no comparable data,				
	Workshop Updates		no					
	Collateral		no					
	Collateral		no					
	Training		no					
	Training		no					
	Webinars and collateral		no					
	Drop-in sessions and collateral		yes		Rating 1-5	3.98 / 79.6%	Rating 1-5	3.79 / 75.8%
	Team training and drop in sessions		no					
	Workshops and collateral		no					
	Workshop		no					
	Full training delivery		yes		Rating 1-5	4.43 / 68.6		
	Training		no					
	Learning Collateral		no					
	Video		no					
	Training		no					
	not yet at delivery	Karen Lynley/	NAD	Not At Delivery				
	did not get to delivery		NAD	Not At Delivery				
	not yet at delivery		NAD	Not At Delivery				
	did not get to delivery (became IMF)	Karen Lynley/	NAD	Not At Delivery				

<b>Units</b>	<b>24</b>
<b>Defects</b>	<b>15</b>
<b>DPU</b>	<b>0.624</b>
<b>Zoverall</b>	<b>0.09</b>
<b>Zwithin</b>	<b>1.59</b>

19 Individual Projects      24 events for potential evaluation      11 Trainers      9 known / 15 unknown

# Plan 'A' – Learner Data Collection

## Totals & reflections



<b>Trainers</b>	<b>11</b>	<b>Quality of training average</b>	<b>77.53</b>
<b>Individual Projects</b>	<b>20</b>	<b>Confidence to apply learning average</b>	<b>84</b>
<b>Events to be evaluated</b>	<b>24</b>		
<b>Evaluation progress known</b>	<b>9</b>		
<b>Unknown (defect rate)</b>	<b>15</b>		

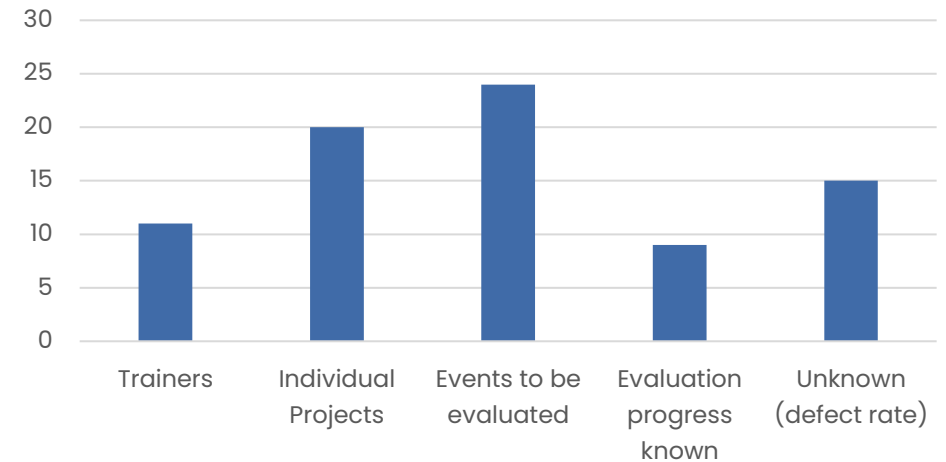
### Reflections on the survey analysis:

- Change trainers are under different leaders with:
  - No consistency with file naming protocols within Objective
  - No consistency in the way to file the records meant more time required to go through them
- Couldn't access/open some documents
- No Project evaluations, though some information pertaining to this may have been captured within Project 'Lessons Learned'
- Little consistency on the learner evaluations with different wording of questions and scoring
- Response rate not always recorded. E.g. Training 77%

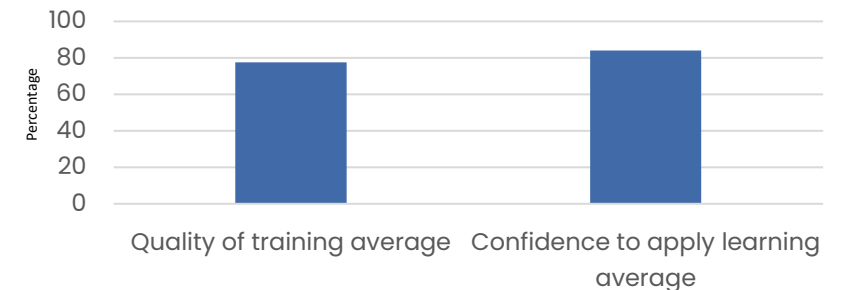
### Next steps

As the number of actual evaluations with recorded results was so low and as the nature of a change trainer's role is multi-faceted (e.g. there may not be direct training, it may be learning collateral or work to be handed over for BAU), Project Management Services will be surveyed to get historical performance data.

### Learner Evaluation results



### Evaluation of Learning





# Plan 'B' – The alternative data collection plan

**Plan B** Survey the Project Managers (PMs) to understand their perception of the change training value and performance of the Change Trainers.

While this approach relied on the memory and perception of the Project Managers, it was them who were ultimately responsible for the timely and effective rollout of the project and was valuable and necessary feedback.

The approach:

1. Create an initial draft of a new survey for PMs
2. Review the survey with the Manager of Project Management Services (PMS) - **Approved**
3. Submit the survey and proposed approach to the Ethics committee for review - **Approved**
4. Send the survey to PMs and promote its completion (Manager- PMS)
5. Run the survey period and close after two weeks.
6. Analyse the results

# Plan 'B' – The survey

Measure



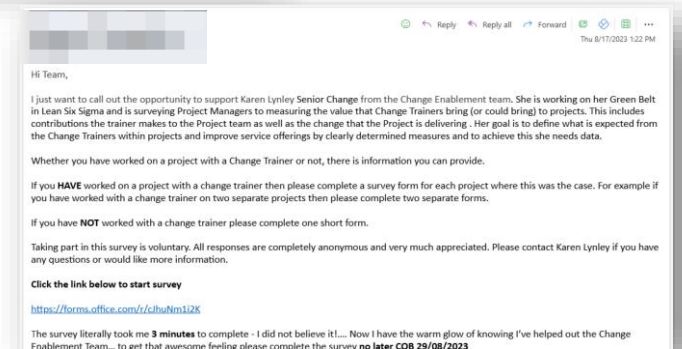
## THE SURVEY

- YES/NO 1. I have worked with a Change Trainer on a Project  
**If answer = NO**
- RATING 1-5 2. I understand the role a Change Trainer has in a Project to both the Project team and the learners impacted by the change
- RATING 1-5 3. I understand the difference between a Change Trainer and a Change Manager
- RATING 1-5 4. If applicable I would like to have a Change trainer on my current of future projects  
**If answer = YES**
- RATING 1-5 5. I was satisfied with the level of information and documentation provided to me by the Change Trainer during their time on the project?
- RATING 1-5 6. I was satisfied with the level of engagement and support offered by the Trainer to the project team
- RATING 1-5 7. In your opinion, did the training materials, collateral and/or engagement provide sufficient information to learners (to adopt the change)?
- RATING 1-5 8. Based on any feedback you received, how satisfied do you feel the business was with the level of and accessibility of the training?
- YES/NO/OTHER 9. Did the Change Trainer deliver requirements within the Project deadlines?
- RATING 1-6 10. How important was the training to the successful rollout of the change
- LIST 11. What did you value most about the Change Trainer? Select the top four things you valued the most
- TEXT 12. In hindsight, what could the change trainer have done differently to improve the outcomes of their work (with either the project team OR the learners)?
- TEXT 13. What were the benefits of having a Change Trainer as part of the project team? Please add any further comments here.

**Manager – PMS sent to:**

**Project Management Leadership and Project Management Services (APPROX. 63 PEOPLE)  
With an emphasis on Project Managers completing it (APPROX. 33 PEOPLE)**

**18 responses to the survey**





# Plan 'B' - the survey and the results

18 total responses to survey of Project Managers

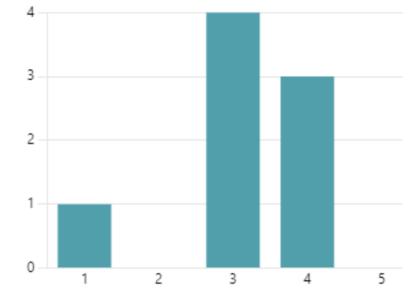
1. I have worked with a change trainer on a project. **18 responses**  
(Yes 10 = 56%, No 8 = 44%)



2. I understand the role a Change Trainer has in a project to both the project team and the learners impacted by the change.  
**8 responses (branching question from 'No')**

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

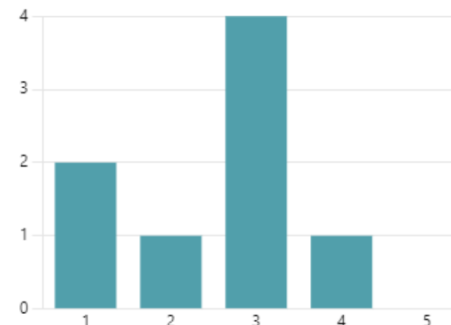
3.13  
Average Rating



3. I understand the difference between a Change trainer and a Change Manager  
**8 responses (branching question from 'No')**

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

2.50  
Average Rating



**Insight:** Some PMs are vague on the specific value a Change Trainer brings to a project and don't know when to engage them.



# Project Manager survey results + insights

## 10 responses (branching question from 'yes' at Question 1)

4. If Applicable I would like to have a change trainer on my current or future projects

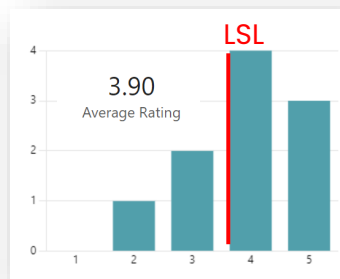
5 Yes

2 Other: I can't answer that honestly without knowing what a change trainer does  
I do not work on projects

5. I was satisfied with the level of information and documentation provided to me by the Change trainer during their time on the project

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes

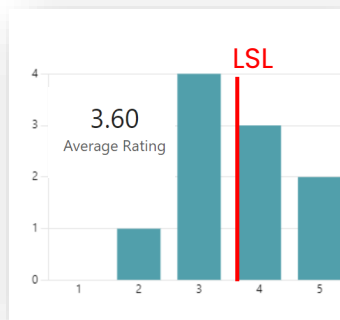


**Sigma level 2**  
Require at least 6 sigma

6. I was satisfied with the level of engagement and support offered by the Trainer to the project team

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes



**Sigma level 1.5**  
Require at least 6 sigma

**Insight:** PMs want a Change Trainer on their project and would like more collateral, engagement + support from some

Process Sigma Level Calculator - Discrete Data			
Sample Data (user inputs):			
Number of units	n		10
Total number of defects observed	d		3
Number of defect opportunities per unit	o		1
Sigma Shift (typically +1.5)			1.5
Results:			
Defects per Unit	dpu		0.3
Defects per Million Opportunities	dpmo		300,000.0
Defects per Opportunity	dpo%		30.00%
Yield	yield%		70.00%
Process Sigma Level	sigma		2.024

Process Sigma Level Calculator - Discrete Data			
Sample Data (user inputs):			
Number of units	n		10
Total number of defects observed	d		5
Number of defect opportunities per unit	o		1
Sigma Shift (typically +1.5)			1.5
Results:			
Defects per Unit	dpu		0.5
Defects per Million Opportunities	dpmo		500,000.0
Defects per Opportunity	dpo%		50.00%
Yield	yield%		50.00%
Process Sigma Level	sigma		1.500

# Project Manager survey results + insights



## 10 responses in this section

7. In your opinion, did the training materials, collateral and/or engagement provide sufficient information to the learners (to adopt the change?)

● Yes ● No

7

3

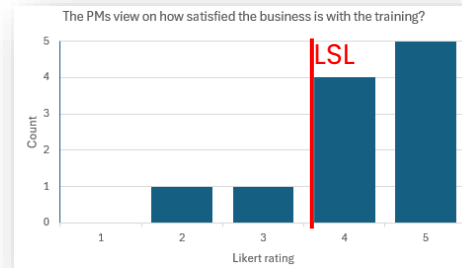


**Insight:** 7/10 PMs were sufficiently satisfied with the accessibility, information + training provided. Some deadlines may have been missed

8. Based on any feedback you received, how satisfied do you feel the business was with the level of and accessibility of the training

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes

**Sigma level 2.3**  
Require at least 6 sigma



Sample Data (user inputs):			
Number of units	n		10
Total number of defects observed	d		2
Number of defect opportunities per unit	o		1
Sigma Shift (typically +1.5)			1.5
Results:			
Defects per Unit	dpu		0.2
Defects per Million Opportunities	dpmo		200,000.0
Defects per Opportunity	dpo%		20.00%
Yield	yield%		80.00%
Process Sigma Level	sigma		2.342

9. Did the Change trainer deliver requirements within the project deadlines

6 Yes

1 No

3 Other:

I think the Change Manager did a lot of the thinking up front  
I cannot remember  
Sometimes



# Plan 'B' - the survey and the results

10. How important was the training to the successful rollout of the change? **10 responses**

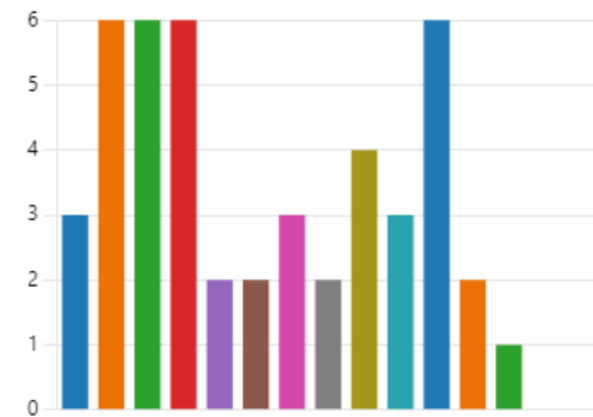
Extremely important	6
Somewhat important	2
Neutral	2
Not so important	0
Not at all important	0



**Insight:** PMs agree the change training is important to their projects and valued the facilitated sessions

11. What did you value most about the Change trainer? Select the top four things you valued the most. **10 responses**

Critical thinking	3
Innovative collateral (Atamai pa...	6
Putting the learner at the heart ...	6
Facilitation of learning	6
Teamwork and collaboration	2
Skill gap analysis	2
Clear communication	3
Design work	2
Making learning accessible	4
Clear and accessible resources	3
Presentation skills	6
Planning and strategy	2
Relationship building (with SME'...	1
Efficiencies	0
Other	0





# Plan 'B' - the survey and the results

**12.** In hindsight, what could the change trainer have done differently to improve the outcomes of their work (with either the project team OR the learners) **8 responses**

Not sure Karen was brilliant

n/a

Clear reporting on what they have achieved. Clear plan to present to steer co or business groups.

n/a

Understood their audience and how they might learn best. More time spent on mindset changes and the details of the role.

I think we needed the trainer at a later stage in the work. We were transforming from one project into another broader one and the work the trainer would have been involved in properly was transferred to a later stage.

Trainer had a great attitude but wasn't on top of sharing what they were working on with the team, which meant we lacked visibility and confidence they were ready to deliver

Tricky. First change trainer was superb and their analysis and material provided was insightful. They left and the next one ignored all the good work that had been done so the desired outcome wasn't achieved.

**Opportunities:** Need a clear plan with entry into the project timed well. Clear reporting / visibility of their work

**13.** What were the benefits of having a Change trainer as part of the project team? Please add any further comments here. **9 responses**

Provide people with a way to access the key knowledge to need to follow the new process.

n/a

they have great benefit of bring our people up to speed on the changes. communication skills and just trusting your trainer is key to successful handover.

added a different perspective to other project team members, which helped improve the way we were doing things as well as improve the end products

Ensure BAU obtains value delivered from project/ ensures project is successful.

Provided a focus on the training requirement

It takes a load of work off of other team roles that might have to pick up the slack of developing and presenting training material (speaking as a PM who has led some of that training in previous workplaces it is great to have a person in that role).

Sole focus on meeting the needs of learners and success of the change

Bringing insight and understanding of the organisation as a whole and providing good data to understand gaps and solutions



# Project Manager survey results and insights

## Summary of the findings

Summary of finding	Average Survey rating	Potential actions or countermeasures to be considered in the improve stage
Some PMs are vague on the specific value a Change Trainer brings to a project	2.8 out of 5 (too low)	Provide easy reference to PMs so they can see the value of a change trainers
PMs want a Change Trainer on their project and would like more collateral + engagement from some of them	3.75 out of 5 (too low)	Standardise the project touch points and deliverables (at least as a minimum requirement)
Most PMs were sufficiently satisfied with the information / training provided, but some deadlines may have been missed	2 out of 3 (need 100%)	TL and Team to see progress and discuss risks at the weekly team meetings – so that the work is well managed
PMs agree the change training is important to their projects and valued the facilitated sessions	4.4 out of 5 (Good)	No action
Need a clear plan with entry into the project timed well. Clear reporting / visibility of their work	Open question	<ul style="list-style-type: none"> <li>Ensure the change training plans are layered into the overall project plans so that milestones are visible and successfully delivered on time and in full to the right level</li> <li>Ensure a process to feedback how CT performed on the project</li> <li>Confirm the best entry point for change trainers into a project</li> <li>Provide easy reference to CT process so that PMs so they can see when they needs to join a project</li> </ul>

# Maturity levels of the change training

Key – Blue is current state and green is the target

	1 – Initial	2 – Process Aware (Some / Repeating)	3 – Defined (Maturing / Used)	4 – Capable (Good / Often)	5 – Optimising (Excellent / All)
<p><b>Strategic alignment</b></p> <p>Do the initiatives, repeating outcomes and processes link to the strategic intents? Does it support the fulfillment of Kainga Ora's purpose?</p>	None	There are some outcomes and / or initiatives that link to higher level strategic intents but they may not cascade down to specific objectives or targets	High level strategic plans cascade down to specific objectives, targets and / or service performance expectations (SPEs)	<p>Performance metrics are compared to SPEs and targets that are directly linked to strategic intents and annual business plans</p> <p>The strategy and annual business objectives drive top down initiatives to uplift performance</p>	<p>The business unit is highly capable + successfully balances strategic delivery + their contribution to the outcomes.</p> <p>All outcomes and improvement activity are aligned and prioritised to the: strategic intents, architectural plans, performance requirements and/or regional plans. There is a clear link between the layers</p> <p>Annual objectives, business plans and performance expectations are clearly communicated and delivered to the expected time / cost / quality requirements</p>
<p><b>Success Measures</b></p> <p>How is the business team/unit performing and how do the team members and stakeholders know?</p>	No SPEs, targets or metrics	Process performance metrics are basic, team specific and they may be updated infrequently and/or be difficult to access	<p>Measures of performance are reported and displayed with minimal lag times. The measures are discussed within meetings that include all team members and are checked against SPEs</p> <p>SPEs and metrics are not always clearly defined at the appropriate level</p>	<p>Evidence that visual, input and output SPE performance measures are updated at appropriate intervals to the frequency of the deliverables</p> <p>They are used to: manage the process, provide early warnings of risks/issues and drive improvement activity</p>	<p>Real time automated dashboards are used by the team to manage and self-correct performance at all levels</p> <p>Continuous improvement activity links directly to the performance of the end-to-end process or value of the outcomes</p>
<p><b>Process Management</b></p> <p>Does the business team / unit consistently meet the agreed performance targets and run improvement activities to uplift performance or the value of the outputs? Do they use a systematic approach?</p> <p>How do they ensure consistency and what steps do they take to minimise variation?</p> <p>If the business team contribute to a larger process, is the end-to-end process consistently meeting performance expectations? Is there effective communication between upstream and downstream teams?</p>	No	<p>There are some high level processes documented but they are not universally adopted or standardised in their format</p> <p>Measures of success may be discussed at team meetings but are not yet a scheduled agenda item</p> <p>There is evidence of inconsistent results and some outputs miss expected time frames and/or quality requirements</p>	<p>End to end processes are documented along with the procedure level work instructions and training materials. All documents are available to the team members and the work is generally completed following the processes described</p> <p>Some evidence that corrective actions are taken to bring an underperforming process back to an expected level. Incremental improvement initiatives deliver small or basic process improvements</p> <p>Larger risks are managed</p> <p>The process is mostly performing to expected performance levels</p>	<p>The process documents are accessible and stored in a process repository with the versions controlled. Documents have a standard format, are reviewed and the processes described within them, improved</p> <p>Team members have a detailed knowledge of the end-to-end processes described and their contribution to the outcomes of the process are known by them.</p> <p>Corrective actions successfully bring underperforming processes back to expected levels and improvement initiatives uplift the performance or value of the outcomes and reduce risks</p> <p>Where necessary, there is effective communications between teams</p>	<p>Process management and continuous improvement are 'baked' into their DNA. The processes perform consistently at or above the expected levels.</p> <p>The team members understand the expectations and their individual contribution to the SPE performance for each element of the end-to-end process.</p> <p>The reliance on manual processes is reduced by: best practise end to end process design and simplified by the adoption of workflow and technology solutions aligned to architectural plans</p>
<p><b>Our People</b></p> <p>Does the business team / unit have the capability / skills to manage and deliver the repeating outcomes and uplift the performance using best practise CI techniques?</p>	No	Some of the business team / unit execute their process scope and manage their work using the best locally known practise. On the job training is provided to set team members up for successful process execution	<p>The business team / unit have sufficient capability to manage the processes to current levels of performance. Knowledge is shared to uplift people capability towards subject matter expertise. New starters are trained and supported in the operational model</p> <p>The process is standardised across the business team / unit</p> <p>A capability model is available to the team</p>	<p>The end-to-end process is standardised and performed the same way by all business teams / units involved in the end to end process.</p> <p>All process managers and business teams / units work collaboratively to manage and improve the end-to-end process performance to meet SPEs</p> <p>Change management and people capability tools and techniques are used regularly</p>	The Process Owner, managers and the business teams / units work collaboratively to review and uplift the end-to-end process performance using best practise improvement techniques
<p><b>Leadership and Culture</b></p> <p>Is there an environment within the business team/units where everyone has the opportunity to discuss and take action on the elements of process management and process improvements?</p>	No	Discussion is encouraged on potential process improvement ideas in team meetings. Some incremental changes are delivered collaboratively. There may be some silo thinking	Process improvement techniques are used by the team members (but not necessarily all) to openly discuss and deliver incremental and smaller step changes, to uplift local performance and reduce risks	<p>Process improvement techniques are used by team members (but not necessarily all) to deliver enterprise changes to uplift overall performance</p> <p>There is strong operational rhythm providing structure to the working days so the team can spend more time on value-add activities</p> <p>The team engage stakeholders to deliver end to end improvements and reduce risks</p> <p>The team is able to adapt to positive changes</p>	<p>End to end processes are reviewed regularly with improvement activity focusing on the best opportunities to uplift the value of the outcomes, the process performance and reduce risks</p> <p>Best practice improvement techniques are used by cross functional teams.</p> <p>A culture of 'change as usual' is embraced</p>

# Maturity Assessment

Measure



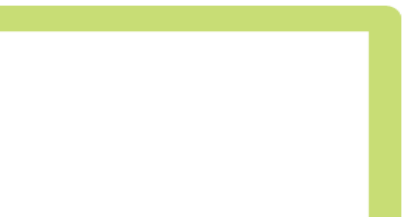
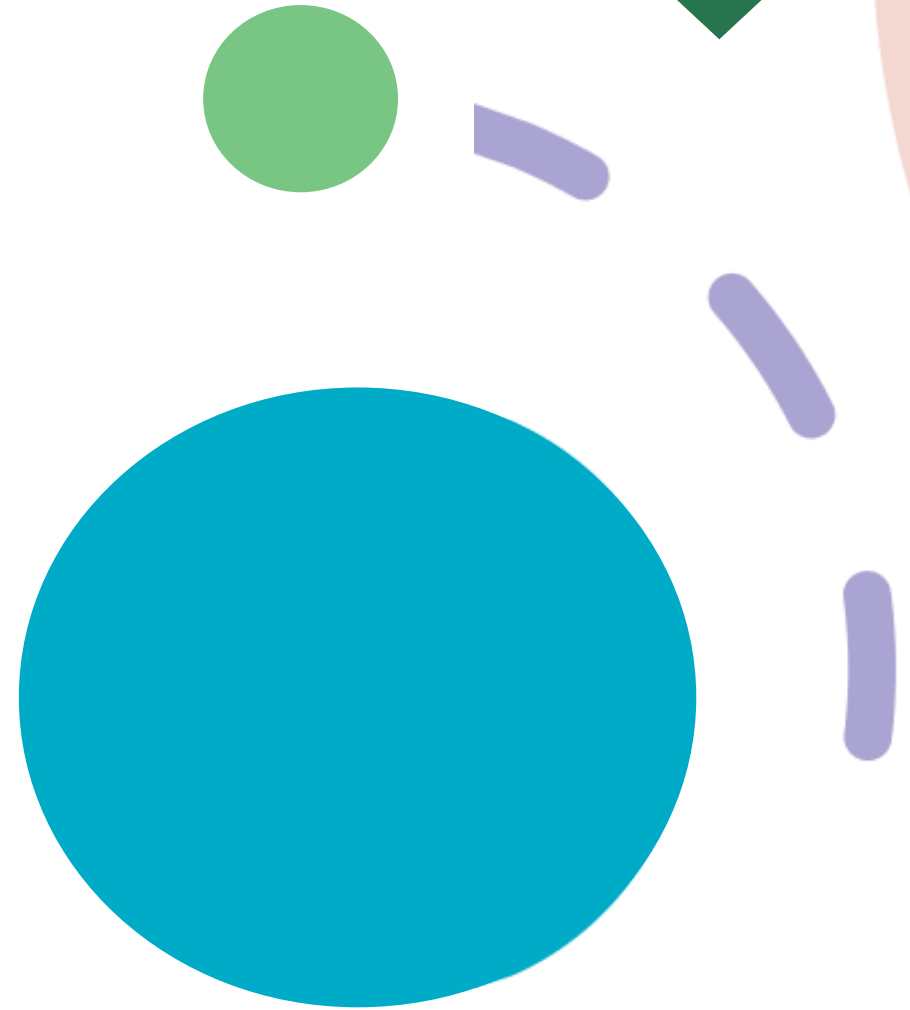
Category	Maturity uplift required
Strategic alignment	2 to 3
Success Measures	2 to 4
Process Management	2 to 4
Our People	2 to 4
Leadership and Culture	2 to 4

# ANALYSE contents

Analyse



Planning for the 'Analyse' workshop  
Cause and Effect Fishbone  
Prioritise the 'causes'  
Affinitise the root causes





# Planning for the 'Analyse' workshop

1. Invite Change Trainers and Team Lead to Workshop Cause and Effect
2. Create agenda, identify effect, set up Miro board and working tools
3. Facilitate meeting
  - Recap of project
  - Brainstorm
  - Prioritisation voting
  - Consolidation of themes
  - Agree on wording of root cause
  - Explore potential countermeasures
  - Agree next steps
4. Chart results
5. Email outcomes and suggested countermeasures based on the group discussion. Invite further comment (with deadline)

## **Next steps (Improve)**

6. Set up meeting with Team Lead to interpret results
7. Meeting with Team Lead, use a pick matrix to confirm and prioritise countermeasures
  - Countermeasures for Improve phase agreed
8. Send report with final countermeasures to Change Training Team

# CAUSE AND EFFECT FISHBONE

Analyse



# AFFINITY/ROOT CAUSE results

Analyse



## PROCESS/DOCUMENTATION

NO DOCUMENTED CHANGE TRAINER PROCESS WITHIN PROJECTS INCLUDING DOCUMENTATION STORAGE

- No clear requirements when handing over to BAU
- No central area for documentation

## DEFINING AND DEMONSTRATING

NO DEFINITION, EXMAPLES, EXEMPLARS AVAILABLE TO THE BUSINESS

- PMS Teams not aware of the skills/value we bring
- less awareness, of the role. Role clarity between CM & CT
- Project Managers need better descriptions of what each role does.
- No examples of what trainers have done on other projects that has been successful.
- No clarity of what is the role of a change trainer is and what makes great training at Kāinga Ora

## EVALUATION

NO CONSISTANT EVALUATION PROCESS AND REPORTING

- No Consistency of questions asked to identify value (feedback post training)
- Project team are not routinely asked for feedback on the role
- Asking for feedback from trainees but also project groups
- No consistent wording flexible enough to take into account all needs of evaluation
- No consistency in where feedback lives and what it is called

## PEER FEEDBACK AND COLLABORATION

NO DOCUMENTED PEER FEEDBACK OR SELF REVIEW PROCESS FOR CONTINUOUS IMPROVEMENT

- No opportunities to collaborate deeply for the benefit of the training (share good examples etc.)
- Peer review
- No process for getting feedback from senior trainers

## TECHNOLOGY

LACK OF TECHNOLOGY ACCESS OR DEVELOPMENT FOR CHANGE TRAINER SPECIFIC NEEDS

- The tools available have no clear owners, there are lots of road-blocks when trying to get what we need.
- No clear configuration of the technology- software. The device are not equipped to handle the software
- Our LMS is not fit for purpose.
- No database /tech for recording results

## PEOPLE/TEAM MANAGEMENT

ROLE TITLE LACKS CLARITY AND PROCESS OF ASSIGNMENT OF CT CAN BE LATE

- Role doesn't adequately describe what we do -needs a different name
- Trainers not always on a project right from the start
- No clear process for storage of lessons learned all together for projects
- Unclear what each trainer 'specialise in' or if they can be assigned appropriately

Votes

7

14

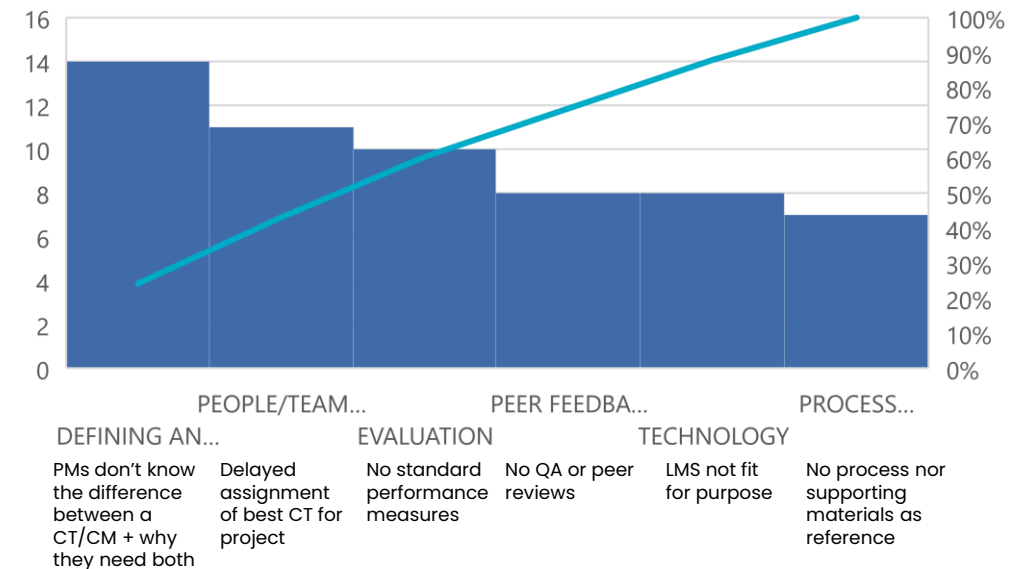
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8

8

11

Consolidated Root Cause Areas



# IMPROVE contents

Improve



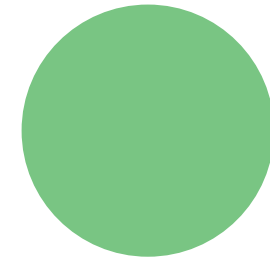
Actions to Improve maturity

Potential countermeasures

Pick Matrix results

Confirmed countermeasures

Improvement actions and outputs for each root cause and countermeasure (6)



# Actions to improve process maturity

Improve



Category	Maturity uplift required	Action
Strategic alignment	2 to 3	<ul style="list-style-type: none"><li>• Set a target for project team feedback surveys for critical questions. (Karen to work with the team to determine the target)</li><li>• Compare and agree what, if any actions need to be taken when below target</li></ul>
Success Measures	2 to 4	<ul style="list-style-type: none"><li>• Track performance of learner engagement feedback and Project surveys as a whole. Make visible and shareable.</li><li>• Line Manager to monitor and enhance the process or skills of the team when necessary.</li><li>• Ensure survey result tracking files are held in a secure repository</li></ul>
Process Management	2 to 4	<ul style="list-style-type: none"><li>• Expectations, process supporting docs and ref. materials are to be available to the team.</li><li>• Measures of success are to be discussed in the Line Manager 1 on 1's with the team members and build a set of actions if required to address gaps.</li><li>• Support is provided to CTs if they (or others) raise risks to upcoming change training success.</li><li>• Line Manager or peer reviews of training artefacts and methods are to be built into the process.</li></ul>
Our People	2 to 4	<ul style="list-style-type: none"><li>• Methods used and best practise to be discussed in the Line Manager 1 on 1's with the Trainers (or formalised peer support) to check if the documented best practise is adopted and to identify future improvements to the reference materials.</li></ul>
Leadership and Culture	2 to 4	<ul style="list-style-type: none"><li>• Regular meetings are to include Improvement activity and reporting on performance.</li><li>• Improvement champion(s) to be assigned who can lead the discussion and co-ordinate the activity.</li></ul>

# Potential Countermeasures

Improve



Root cause	Potential countermeasures
<p><b>PROCESS DOCUMENTATION</b> No change training process nor supporting materials as reference</p>	<ul style="list-style-type: none"> <li>• Document and publish the change training process + RACI + reference templates + min standards + guides (with content including the inputs and deliverables)</li> <li>• Define, create and publish the documents to be stored</li> <li>• Define and create the repository</li> </ul>
<p><b>DEFINING + DEMONSTRATING</b> PMs don't know the difference between a CT/CM + why they need both</p>	<ul style="list-style-type: none"> <li>• Create Atamai page with a video defining helpful resources. To include the following. <ul style="list-style-type: none"> <li>• Definition of change training value, skills and process steps in the wider context of change management</li> <li>• Exemplars of work accessible to the business</li> <li>• Feedback comments from previous customers (project managers and business owners)</li> </ul> </li> </ul>
<p><b>EVALUATION</b> No standard performance measure</p>	<p>Create a consistent process to evaluate the change training</p> <ul style="list-style-type: none"> <li>• Agree approve the evaluation method and content (+ build it into the process)</li> <li>• Create, approve and publish templates (and guides TBC)</li> <li>• Template evaluation survey to provide to Project teams</li> <li>• Agree a performance target for critical survey questions to the project team</li> <li>• Build, get approval and share a centralized resource to display the overall performance of the CTs (from learner + project team surveys)</li> <li>• Set up a central and retrievable repository for archive evaluations (with standard naming conventions)</li> </ul>
<p><b>PEER REVIEW + FEEDBACK</b> No QA or peer reviews</p>	<ul style="list-style-type: none"> <li>• Identify and develop peer review steps and build it into the standard process</li> <li>• Provide a checklists that can be used for both the CT and the reviewer to check for missing steps / artefacts</li> </ul>
<p><b>TECHNOLOGY</b> LMS not fit for purpose Nowhere to record standard evaluation measures</p>	<ul style="list-style-type: none"> <li>• Identify business owners and create guidance – <b>Out of scope</b></li> <li>• Categorise technology needs and demonstrate needs – <b>Out of scope / recommendations only</b></li> <li>• Implement a new LMS – <b>Out of scope</b></li> <li>• Create a place of record for CT evaluation results – <b>In scope</b></li> </ul>
<p><b>PEOPLE/TEAM MANAGEMENT</b> Role title lacks clarity Delayed assignment of best CT for project</p>	<ul style="list-style-type: none"> <li>• Create and propose new role title – <b>Out of scope</b></li> <li>• Guidance for when and how to assign CT to project – <b>Out of scope</b></li> <li>• Create a centralised area for all lessons learned (<b>Out of scope</b>) and/or for change training engagements. Add to process+RACI – <b>In scope</b></li> </ul>
<p><b>PROCESS MANAGEMENT UPLIFT</b></p>	<ul style="list-style-type: none"> <li>• Regular meetings to have a standing agenda item for reporting on performance (from the PM and learner surveys) and improvement activity</li> <li>• Improvement champion(s) to be assigned who can lead and co-ordinate improvement activity – <b>Out of scope</b> in current org review</li> <li>• Support is provided to CTs if they (or others) raise risks to upcoming change training success (add risk/ issue analysis to process and peer review)</li> </ul>



# Confirmed improvements

Improve



ROOT CAUSE	CONFIRMED COUNTERMEASURES for Improve Phase
<p><b>1.</b> No documented change trainer process nor RACI. No standard doc storage repository</p>	<p>✓ Map of Change Trainer Process of work and documentation</p>
<p><b>2.</b> No reference examples, exemplars available to the business No definition of what Change Training offers a project</p>	<p>✓ Create Atamai page with a video defining Change Training, exemplars of work, helpful resources etc. Collated repository for Change Trainer use</p>
<p><b>3.</b> No consistent evaluation process and reporting</p>	<p>✓ Create a consistent process of evaluation of learning and evaluation of trainer within project team. Agree and embed targets</p>
<p><b>4.</b> No documented peer feedback or self-review process for continuous improvement</p>	<p>✓ Develop peer review process and guidance</p>
<p><b>5.</b> Lack of technology access or development for change trainer specific needs</p>	<p>✓ Research option for evaluation database</p>
<p><b>6.</b> No current Process Maturity uplift planning or Risk mitigation</p>	<p>✓ Process for recording and mitigating risks, procedure for review of current improvements and planning of further improvements</p>

# Improvement 1

Improve



**ROOT CAUSE:** No documented change trainer process within projects including documentation storage

**COUNTERMEASURE:** Map Change Trainer Process of work and documentation

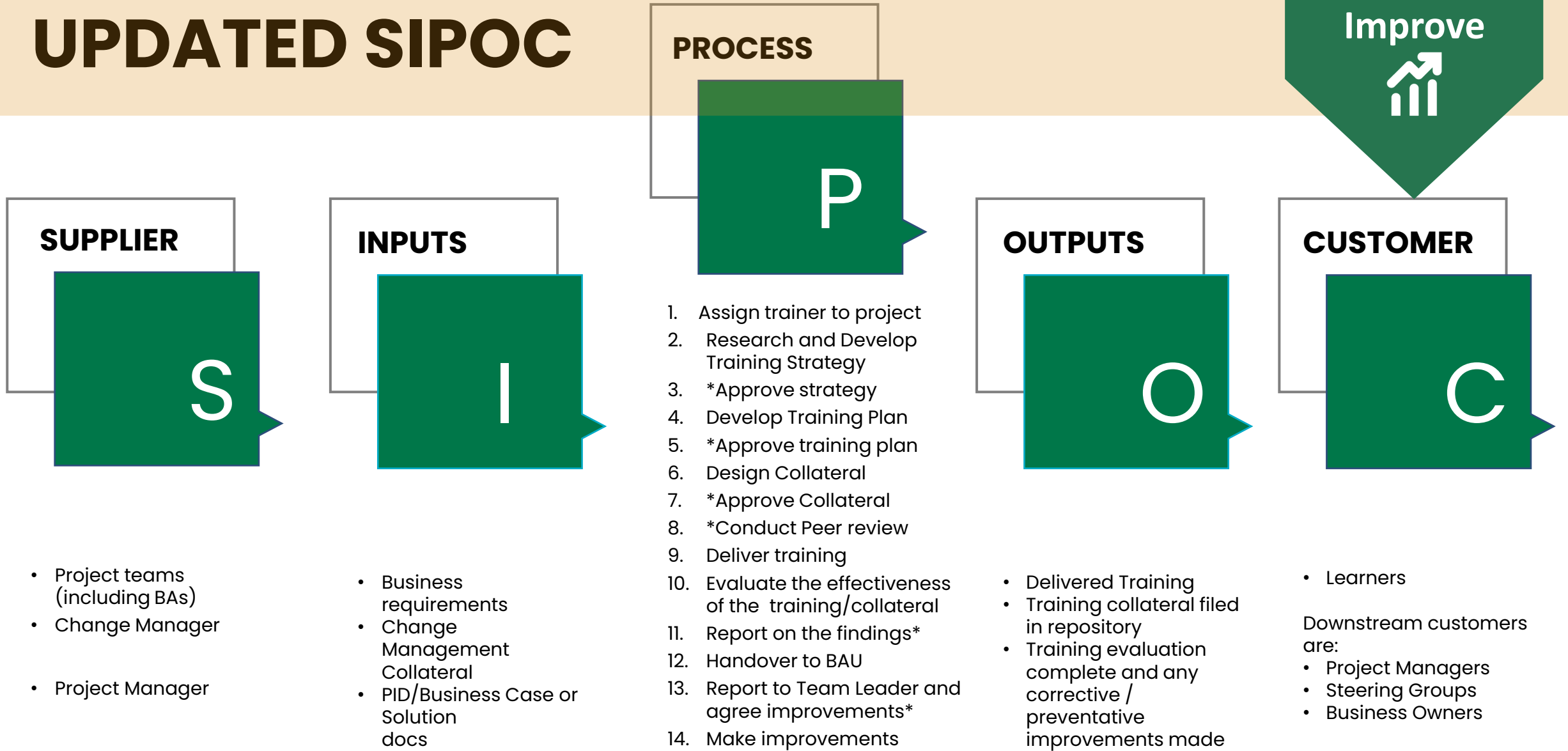
## **ACTIONS:**

- Draft process
- Review with Change Trainers
- Insert new processes where required (e.g. Peer review)
- Define documentation process
- Draft guidance
- Review with Change Trainers
- Publish on Atamai page
- Collated library for resources and for storage of templates, learning resources and links for professional development by Change Trainers
- Final Approval by Team Leads

## **FINAL RESULTS**

Over-all process map, documentation process and repository approved, socialized and published

# UPDATED SIPOC

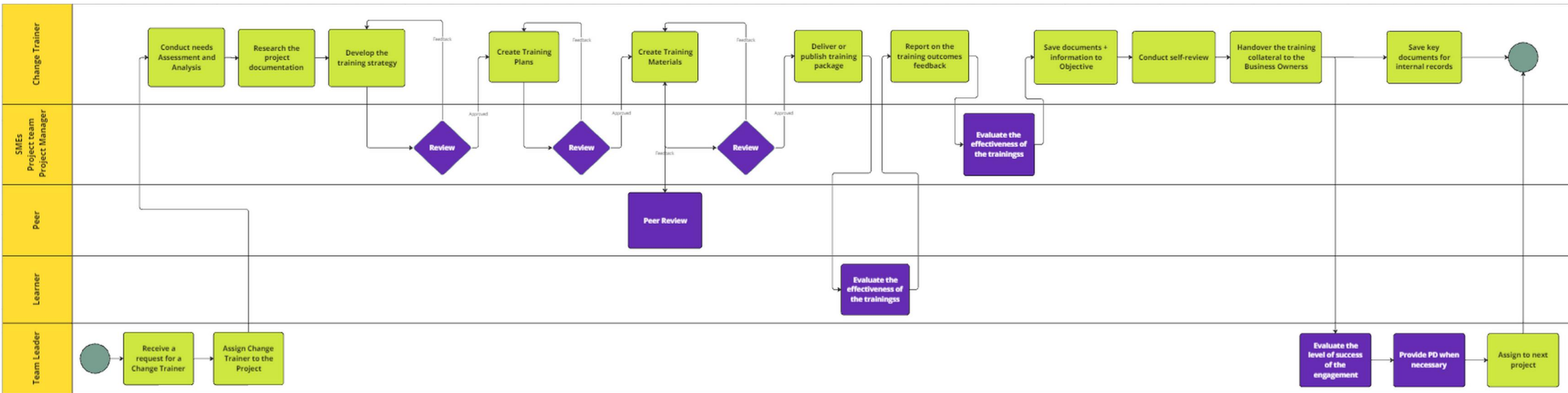


\*New parts of the process ([see improvement 1 for the swimlane diagram](#))

# Improvement 1. – Change Trainer Process

## Improvement 1.

- Change Trainer Process and RACI
- Storage of Change Training Documentation
- Published to the Atamai Change Trainer Page



The Atamai page contains an image of this process

# Implementation RACI

## Improvement 1.

- Change Trainer Process and RACI
- Storage of Change Training Documentation
- Published to the Atamai Change Trainer Page

Status	Task	LSS project lead	Change Trainers	Change Managers	Project Managers	Change Ldrs (Bus Owner)	Learner	Database owner
✓	Confirm who is sufficiently experienced to do the peer review and approval work.	A	C/R	I	I	C		
✓	Develop and publish the new process with clear accountabilities, templates (e.g. survey), reference materials (e.g. Peer review steps)	A	C/R	I	I	C		
✓	Define the docs to be stored, the location and naming protocol.	A	R			C/R		
✓	Rollout/socialise the new process, accountabilities and check it is being adopted. Rollout doc storage to the team and check it is being adopted	R	R	R	I	A		
✓	Design, develop and create the video to describe the value of change trainers and their approach	A	R/C			C		
✓	Create Atamai page and load the video, exemplars of work and reference materials.	A/R	C		C	C		
✓	Create MS forms list of reference material. Attach to the Atamai article and rollout to team	A	C/I	I		C		
✓	Confirm the learner survey design and load onto the Atamai page	A	C/I	I	I	C		
✓	Confirm the Project Manager survey design, create the form and load onto the Atamai page	A	C/I	I	I	C		
✓	Research option for evaluation database and make recommendations to Change Leaders	A	C	C		C		C
✓	Complete change trainer engagements and assess the quality and effectiveness of the training to confirm the "after" result	A	R	I	C	I	C	
✓	Audit the effectiveness of the document storage changes	A/R	C			I		
✓	Determine next steps to embed the changes further or close off issues	R	C			A		

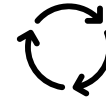
RESPONSIBLE, ACCOUNTABLE, CONSULTED, INFORMED

# Storage of Change Training Documentation

## Evaluation storage

\*Objective works hand in hand with the other systems we use as an organisation e.g. MS Teams and SharePoint, providing a repository for our long-term records. If Camtasia/Storyline files are on Sharepoint links should be added OR store directly in the training folder in Objective IQ

While in progress, documentation is stored with Project/Team documentation in Microsoft Teams. Project Atamai pages may also contain Change training collateral



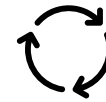
### Improvement 1.

- Change Trainer Process and RACI
- Storage of Change Training Documentation
- Published to the Atamai Change Trainer Page

Hierarchy: Project Documentation \ Change Management \ Training



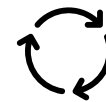
Evaluations of learning should have the word \*evaluation in the title so it can be searched



Final versions should be saved to \*Objective using the same hierarchy as Microsoft Teams.



Key example documents/collateral and evaluations to [Change Training \(sharepoint.com\)](https://sharepoint.com) for storage, knowledge sharing and promotion



The Atamai page contains an image and a link to this sharepoint resource

## Collated repository for Change Trainer use

Change Trainer Documents and Resources – list/library that includes links and attachments.

Having this linked to the page means that it provides further visibility to the business of how we work and what we provide. It also becomes the primary source of information and development for new trainers as Kāinga ora uses multi platforms it can be difficult to locate materials.

### Improvement 1.

- Change Trainer Process (below)
- Storage of Change Training Documentation
- Published to the Atamai Change Trainer Page

The screenshot shows the Microsoft Lists interface for a list named 'Whanau Ako'. The list contains several items with columns for Resource Type, Title, Description, and Links. The items are:

Resource ...	Title	Description	Links
Template	Kāinga Ora PowerPoint template slides	Blank PowerPoint template with graphics, layout, font etc.	
Professional Dev.	LinkedIn Learning collection	A collection of courses within LinkedIn Learning suitable for Change Trainer development. E.G. ADDIE, Fitzpatrick, Change Management, Instructional Design etc.	<a href="https://www.linkedin.com/login/share?account=82623402...">https://www.linkedin.com/login/share?account=82623402...</a>
Professional Dev.	Bloom's Taxonomy	A framework that can be used for designing a learning experience, objectives and evaluations by identifying, classifying, and outlining what students are expected to learn	<a href="https://cft.vanderbilt.edu/sub-pages/blooms-taxonomy/">https://cft.vanderbilt.edu/sub-pages/blooms-taxonomy/</a>
Template	Learning Needs Analysis Template	Used in the Analysis phase, this template can be used as your working document for your project, as a tool to work through with your Change Training Mentor or as a project document for approval. Fields can be deleted or moved as appropriate.	
Template	Training Strategy Template	Can be used in the Analysis and Development stage, official document for project approval	
Professional Dev.	The Kirkpatrick Model of Evaluation	Description of the Kirkpatrick Model of Evaluation, describes its criticisms and names alternative models	
Professional Dev.	New Zealand Association of Training and Development	Professional body, apply to join via people leader as part of Professional Development. Receive magazines, opportunity to attend local and online events, networking and curated library of resources	<a href="https://nzatd.org.nz/">https://nzatd.org.nz/</a>
Learning resource	Adding or change your image on Atamai and Teams	To send to people who do not know how to do this. Having your picture is useful for new people and to help create connection for people viewing Atamai pages with teams listed. Made in 2023	
Learning resource	Screen sharing in MS Teams	Different ways you can share your screen in a presentation. Made 2022	
Guide	Kāinga Ora Brand Guidelines	Official brand guidelines for font, colours, logo etc. Logos and icon suite available via Helium	<a href="https://kaingaora.h...">https://kaingaora.h...</a>

The screenshot shows a detailed view of the 'Learning Needs Analysis Template' item. The item details are:

- Title: Learning Needs Analysis Template
- Resource Type: Template
- Links: Enter value here
- Description: Used in the Analysis phase, this template can be used as your working document for your project, as ...
- Attachments: Learning Needs Analysis Template.docx

The right-hand side of the screen shows a 'Comments' section with a text input field and a 'Be the first one to add a comment' prompt.

# Improvement 2

Improve



**ROOT CAUSE:** No definition, examples, exemplars available to the business

**COUNTERMEASURE:** Create Atamai page with a video defining Change Training, exemplars of work, helpful resources etc.

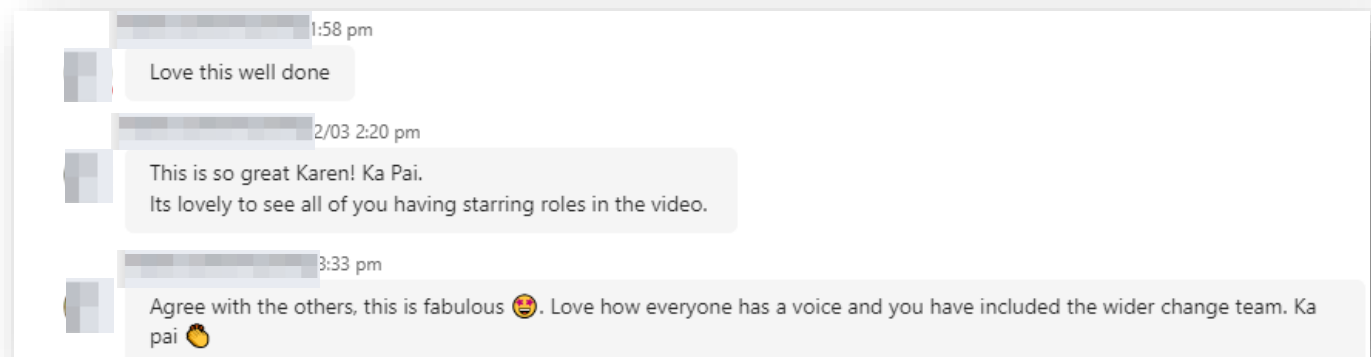
## **ACTIONS:**

- Brainstorm video with Change Trainers
- Each trainer tasked to script their section
- Review sections as a group
- Record, edit and publish first draft of video to Atamai page
- Review by Change Trainers and team Leads
- Change Trainer visual created
- Atamai page further developed with quotes, visuals, links and process documents etc.
- Gather exemplars from Change Trainers
- Set up repository for Change Trainer use
- Draft and insert feedback form in the page to measure the improvement
- Review and approval from leadership team
- Publish full page once other countermeasures completed

## **FINAL RESULTS:**

Atamai page published and available to whole org.

Feedback from team Leads  
on the video and page:



# Improvement 2

## Content of the Atamai page (see images below)

Exemplars, Video, Resources (Creativity in Learning Design, Change Manager role description)

### Improvement 2.

Create an Atamai page

- video defining Change Training
- exemplars of work
- helpful resources

Atamai page content

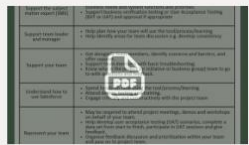
Atamai page content

## Atamai page

Part of what a Change Trainer does is create learning collateral. This can take many shapes and forms. The type of collateral created will depend on the change, and what people need to be supported through that change. Here are some examples of what could be created, designed or sourced.



Information on Communities of Practice



Change Champions by Kelly Layton

### Creativity in Learning Design



Creativity in Learning Design

### Creativity and innovation in learning design



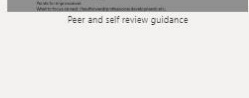
Creativity and innovation in learning design

### How to find other Change Training records



How to find other Change Training records

### Peer and self review guidance



Peer and self review guidance

## MOULD PROJECT - Senior Change Trainer: Karen Lynley

The Mould Project was set up to improve our organisational approach to mould in our homes. It did this by providing clear up to date policies, guidelines and processes and a range of options for our people for dealing with mould in Kāinga Ora homes. It included rolling out a Mould Assessment Tool App to place-based teams in face to face workshops. This was done by the Change Trainer and (via train the trainer) two Customer Practice Trainers. Online mop-up sessions and an onboarding BAU learning module was also provided.

### Change Training involved:

- Presentations to leaders
- Training for strengthened testing of the solution
- Guidance for best practice for CSC
- Video promotion and training videos
- Train the trainer sessions with Customer Experience and Practice
- Co-delivery of Face to Face workshops across Aotearoa to S/HSMs, Regional Leads - Supported Housing, Asset Managers, Maintenance Supervisors, Manager Housing and Wellbeing Support and Team Leaders Housing Support
- Online Mop-up sessions
- LMS module <https://housing.plateau.com/learning/user/catalogsearch/catalogSearchDispatchAction.do?searchType=filteredSearch&keywords=Mould%20Training#>
- Ongoing reporting and project team support

### The Project Team

Senior Project Manager: Brigitta Bartsch

Senior Change Manager: Fazlyn Bharoochi

Senior Change trainer: Karen Lynley

Senior Business Analyst: Nikki Johnson

Technical Writer: Wesley Wana

See below for examples of some of the collateral created for the project.

### Improvement 2.

Create an Atamai page

- video defining Change Training
- exemplars of work
- helpful resources

Atamai page content

Example of a drop-down box showing project exemplars. This format is used for all sections, and every Change Trainer is represented.



## Change Trainer Value Transcript

### Embodying the values (intro): KAREN LYNLEY

As change trainers we whanake. We are bold in our conversations, our approach and our learning designs. We have to hold a space for our learners, the people being impacted by the change and be bold in our learning solutions in order to engage and connect with people.

We mahi tahi, work better together. Supporting, collaborating and working with our teams as well as our learners.

And manaakitanga, holding people at the heart; doing our utmost to meet people where they are at, showing respect, generosity and care for others as we move through the change process.

To achieve these things we use change methodology and ADDIE, a model of instructional design.

### Analyse: Trainer 2

Our first phase of ADDIE is Analyse. We first need to fully understand the change that we are supporting, who will be impacted and what those people will need to adopt the change. We will be asking questions, listening and meeting with people to build the picture of our future state.

As Change Trainers we make sure anything we aim to create is fit for purpose, improves the situation for our people, and achieves business goals through training.

This analysis influences a huge number of decisions later in the process. We are determining the objectives and goals by looking at things such as process, knowledge and/or capability gaps.

The outputs of this phase will be the beginning of documentation such as an overarching Change training strategy , a learning needs analysis, training plans, content analysis or gap analysis as we move into the Design phase.

### Design: Trainer 3

Once we understand from our Analysis what the change is, why we are changing and who will be impacted we move onto the Design phase. Here we complete our Change Training Strategy, designing our approach with the learner at the heart of the process.

High level design will include learning objectives, assessment instruments, lesson planning and media selection.

### Improvement 2.

Create an Atamai page

- video defining Change Training
- exemplars of work
- helpful resources

Transcript of  
the video

# Transcript of video for Atamai page

(Continues on next page)

A 9-minute collaborative video was made to describe the Change Trainer process within each stage of ADDIE and within a project team.

It linked to Kāinga Ora values and Change methodology.

The full video can be viewed here:

## Change Trainer Value video transcript continued

We want to answer questions around how content and activities be delivered, sequenced, assessed and reinforced. What the objectives are of each session, resource or activity and how this supports the overarching objective of the change.

This will also include how we collaborate, mahi tahi and support our working group parallel to the learners and those impacted by the change.

Once we have everything designed we can move into development.

### **DEVELOPMENT:** Trainer 4

Following on from our Analysis and Design, we have Development. Here we start developing the content of the Learning Support.

Based on the previous two stages, we might build a sample of the learning materials we are going to create, along with an overview to help with understanding of the content. This might include plans or prototypes for an LMS Module or Face to Face Session, or a script and draft of an educational video. As Change Trainers we are innovative and passionate about creating interactive learning experiences, and this is our opportunity to show you how creative we can be in supporting the change.

Part of robust content development is conducting reviews, runthroughs and getting feedback from our Change Trainer colleagues as well as our team to identify any areas that need more work. This includes cycles of iterative development in line with an Agile approach which would have been determined in the Design phase. Once development is complete, we will send our content through to our Project Team and other stakeholders for final feedback and signoff.

### **Implementation:** Trainer 5

The next phase is the 'Implementation' phase. As the name suggests, it is here trainers start to put into action the change that needs to take place.

Our work in the Analyse, Design and Development phase ensure we have effective implementation. Knowing that our objectives and outcomes are clear, purposeful and able to be assessed. Knowing who the learners are ensures we can actively build their knowledge and abilities and have success measures in place to that we know this has occurred. Change Trainers deliver the training and resources in the most effective way for the change, the people and the organisation.

Trainers develop a wider range of resources (collateral) to help implement a change, they are experts in this. In Implementation phase we weave together the outcomes, learners, environment and the learning that needs to occur. This might include outputs such as workshops, training sessions, handouts, FAQs, step-through's, webinars, tutorials, videos. We support opportunities to practice, encourage Change Champions, and identify where learners can go for help. Post training, we ensure there is support provided that best suits

the learners and the learning. This could include drop-in sessions, support and more,

Implementation is constantly refined to make it as useful and impactful as next stage of ADDIE helps us to achieve that.

### **Evaluation:** Trainer 6

The final phase in the ADDIE Model is evaluation. Evaluation is a systematic approach to determine the value of the training and learning resources.

While it appears last in the ADDIE design model it actually occurs through the entire process, making ADDIE a flexible and dynamic model able to work within both Waterfall and Agile project methodologies.

Evaluation occurs through each phase, as we evaluate and test the instruction materials for clarity, impact and feasibility and to make sure the training and learning resources will meet the business needs. Iterations, changes and alterations can be made through out this journey.

After learners have completed the training, we conduct summative evaluations based on Kirkpatrick's four levels of Evaluation.

This helps us determine if the learners were motivated to change, picked up the learning and can apply the new skills.

Iterations, adjustments or changes are made before we hand any collateral over to the teams who will use them as part of their day to day working. The evaluation process helps us refine our work for this change and informs how we can improve our support of future changes when we move back through the ADDIE cycle once more.

### **Connection to Change Methodology:** Trainer 7

Addie provides a structured approach to ensure we create learning experiences that are relevant and engaging. As Change Trainers we also use Change Methodology to prepare, support and reinforce the change we are working on.

Tools such as ADKAR, a model for individual change, help us to support people at the right time and in the right way. We work closely with Change Managers who will create a change strategy looking at things such as business readiness and engagement, change impacts, enabling leaders and communication plans.

Together the Change team work closely with the project team and more widely with the business.. He waka eke noa, we are all in this together, and it is together with teams and our people that we can drive successful change.

### **Improvement 2.**

Create an Atamai page

- video defining Change Training
- exemplars of work
- helpful resources

Transcript of  
the video

# Creativity in Learning Design

## Improvement 2.

Create an Atamai page

- video defining Change Training
- exemplars of work
- helpful resources

Brand design  
for the Atamai  
page

This design was created for Change Trainers by Karen Lynley. The intention is to visually depict how a change trainer will take different strands (people, concepts, processes, tools, information) and raranga or weave those strands together to support the learner/the person being impacted by change. This is a collaborative process. 'Nāu to rourou, nāku te rourou, ka ora ai te iwi'. This proverb acknowledges that everybody has something to offer, and by working together we can all flourish.

Change Trainers follow brand guidelines; use internal resources, stock images and free to use material. Consideration is given to the audience (internal vs external) to balance the needs of consistency and brand identity with gaining the attention of often time poor people to motivate them to think and act in new ways.

**“Our automatic, subconscious reaction to a design influences how we perceive its relevance, credibility and even usability. “**

Graphic for  
Atamai  
page

Created to provide information on the importance of creativity and innovation in learning design while meeting requirements of brand guidelines. This is a particular quality and skill for Change Trainers that clearly shows how their work is within the field of Learning and Development

# Change Management

The role of a Change Manager is to manage the people side of change. The goal of Change Management as a discipline is to prepare, engage, equip and support individuals through the change journeys they experience. Change Trainers and Change Managers work as a team to achieve this, but each have specific tasks and individual outputs.

When Change Managers **Define Approach**, they are answering the question: What will it take to achieve success.?

When they **Manage Change** in phase 2; they answer the question: What will we do to prepare, equip and support people?. How are we doing? What adjustments do we need to make?

When Change Managers **Sustain Outcomes** in phase 3; they review performance by answering the question: Are we done yet? What is need to ensure the change sticks?

The outputs of these stages are a Change Management Strategy, Stakeholder Analysis, Planning and Closeout documentation.

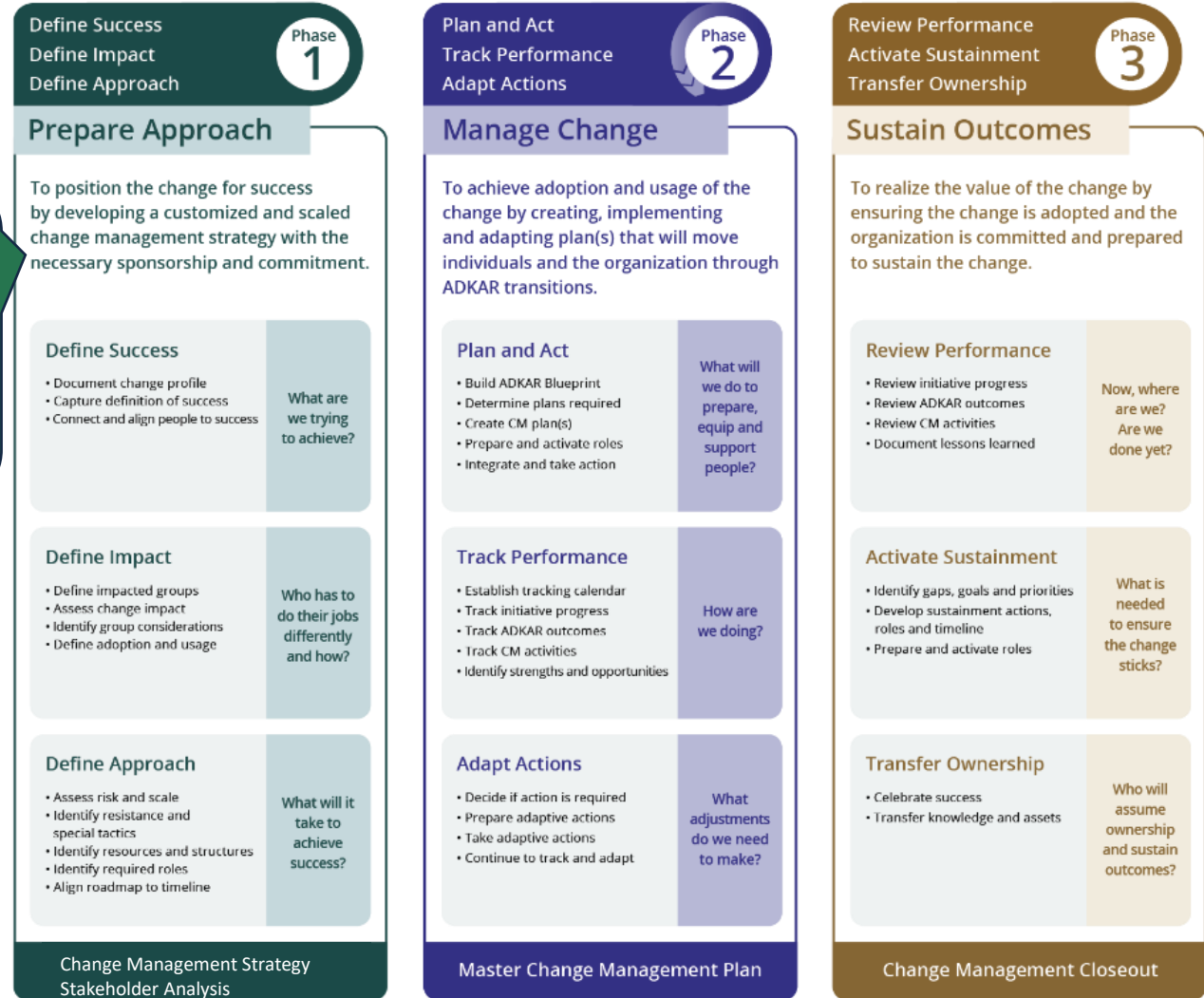
The Change Team work closely with their larger project/initiative or business unit throughout this process.

Image courtesy of Prosci

## Improvement 2.

- Create an Atamai page
- video defining Change Training
  - exemplars of work
  - helpful resources

**Atamai page content**  
Included to give context to the difference between a CT and a CM



# Improvement 3

Improve



**ROOT CAUSE:** No consistent evaluation process and reporting

**COUNTERMEASURE:** Create a consistent process of evaluation of learning and evaluation of trainer within project team.

## **ACTIONS:**

- Compare evaluations available to find common denominators
- Identification of two common areas: Quality of Training (or Training resources) and Confidence to apply learning
- Determine measure (Quality of Training 10-point scale, Confidence 1-5)
- Propose two base questions to be asked in every learner evaluation to the Change Trainer group as all Change Trainers hold responsibility for their own evaluation planning and collecting. Approved and presented to Team lead
- Approval by Team lead [REDACTED]
- Change Trainers to use these two questions in their evaluations
- Draft **Project Team survey** to be sent to the Project team when the Project is closing
- Trial of the survey was run, and the results reviewed
- Report to [REDACTED] of process and result – approval of the survey to use
- Survey shared with Change Trainers
- Set up report and reporting procedure (until a technical solution can be implemented), shared with Change Trainers and Team Leads. Confirm the action point for team lead involvement = Change Trainer score in learner or project feedback is 4 or lower

## **FINAL RESULTS:**

1. All learner evaluations to include 'Quality of Training' and 'Confidence to Apply Learning'
2. All Change Trainers to send Project Survey at the end of their involvement in a project, or annually for longer projects
3. Learner and project evaluations to be reviewed and updated monthly in the 'Evaluation and Feedback Change Trainers' spreadsheet stored in Teams

# Reporting

Excel spreadsheet: Evaluation and Feedback Change Trainers 2024

Is a record of current work underway, captures learner evaluation averages and project feedback in separate tabs, stored in Teams accessible by Change Trainers and Team leads.

## Improvement 3.

Evaluation consistency  
Includes Process management uplift with review built into the procedure

Procedure (stated in the document):

- To be updated monthly (generally at our monthly Whānau Ako meeting) and rows to be hidden when Staff leave
- Copy of Document to be archived annually with any closed projects removed from current document, archive saved to Change Enablement in Objective (link inside document)
- Project feedback to be gathered at the end of involvement in the project OR annually for long term projects
- Ongoing recording of risks that should be noted to all CTs (others should be held in project documents)
- Used as a basis (and record of actions) for Process Maturity uplift planning
- Ensure Team Lead is informed when an individual's score in feedback (learner or project) is or lower than 4

PROCEDURE	Updated monthly	Risk mitigation noted within project docs, here when appropriate for all CTs	Inform team Lead when individual scores below 4	Save to: <a href="#">Change Enablement - Objective ECM (lnz.co.nz)</a>					
Basis for uplift planning	Hide rows when staff leave	Project Feedback to be gathered at the end of involvement in the project OR annually for long term projects	Archive copy Annually 30 June	Remove closed from current					
Last Updated	12/07/2024								
Next Update	30/07/2024								
Change Trainer	Project	Status	Risks to be noted for CTs	Training Type	Audience	Learner Evaluated	Quality of Training	Confidence to apply	Project evaluation
		Final stages due to CD	none	Collateral stored in Atamai	Kāinga Ora	n/a	n/a	n/a	5-Jul
		Discovery/Analysis	Risk from CD org change	n/a	CSC	n/a	n/a	n/a	
		Final work for handover to BAU	none	n/a	OI	n/a	n/a	n/a	n/a not delivering training
Karen Lynley		Halfway through delivery	Risk from CD org change	Online training and collateral	BGIS and RML Spotless Switched On Spencers Asset Managers C&I and Delivery teams Updates to external teams	in progress in progress upcoming upcoming			28-Jun
Karen Lynley		Discovery/Analysis	Risk from CD org change	n/a	Maintenance Partner	n/a	n/a	n/a	
Karen Lynley		Development		Video, LMS Training to operators	Kāinga Ora Place-based	upcoming			
		Develop/Implementation (Agile)	Risk from CD org change	Training and collateral	Support team training	Yes	87.1	4.14	5-Jul
					CBP training	Yes	92	4.2	
					UDD	upcoming			
					Procurement Excellence	upcoming			
		Phase 2	Risk from CD org change	Training and collateral	Purchase to pay team training	Yes	94.2	4.29	5-Jul
					Payables training	Yes	88	4.4	
					Fleet team training	Yes	95	4	
					Finance	Yes	95	4.5	
					Integrity team	upcoming			

## Measuring the value of Change Training

Tená koutou.  
Your feedback helps us to develop and improve our work.  
Please complete the following questions regarding your experience of having a Change Trainer involved in your project/initiative/business unit or team (simply called 'project' in the questions below).

Thank you for your time.

1. Project name:

Enter your answer

2. Change Trainer name:

Enter your answer

3. Length of time the Change Trainer was engaged with your team in this work

Enter your answer

4. I understand the role a Change Trainer has in a project to both the project team and the learners impacted by the change.

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

1

2

3

4

5

...

5. I understand the difference between a Change Trainer and a Change manager

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

1

2

3

4

5

6. I was satisfied with the level of information and documentation provided by the Change Trainer during their time on the project

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

1

2

3

4

5

7. I was satisfied with the level of engagement and support offered by the Trainer to the project team

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

1

2

3

4

5

# Survey design built for future engagements

## Survey for Project Team link has been provided to all Change trainers to use

8. In your opinion, did the training materials, collateral and/or engagement provide sufficient information to the learners (to adopt the change?)

Yes

No

9. Based on any feedback you received, how satisfied do you feel the business was with the level of and accessibility of the training/resources?

Very satisfied

Somewhat satisfied

Neither satisfied nor dissatisfied

Somewhat dissatisfied

Very dissatisfied

Unknown

10. Did the Change Trainer deliver requirements with the project deadlines?

Yes

No

Other

11. How important was the training/resources to the successful rollout of the change?

Extremely important

Somewhat important

Neutral

Not so important

Not at all important

12. What did you value most about the Change Trainer? Please select the top four things you valued the most.

Critical thinking

Innovative collateral (Atamal pages, user guides, videography, infographics etc.)

Putting the learner at the heart of the process

Facilitation of learning

Teamwork and collaboration

Skill gap analysis

Clear communication

Design work

Making learning accessible

Clear and accessible resources

Presentation skills

Planning and strategy

Relationship building (with SMEs, project team, and/or learners etc.)

Efficiencies

Other

13. In hindsight, what could the change trainer have done differently to improve the outcomes of their work (with either the project team OR the learners)

Enter your answer

14. What were the benefits of having a Change trainer as part of the project team? Please add any further comments here.

Enter your answer

**Improvement 3.**  
Evaluation consistency

This survey is to be sent to the project team near the end of the project, at the same time as any final learner surveys would be done. It is particularly useful if the trainer does not have other evaluation surveys (e.g. they did not deliver training, only learning resources) as measurement can still occur.

### **Pilot Test of the Survey to Project team**

Results from trial survey/test with Project Team.

6 responses

#### **Reflection:**

The Survey showed a heightened understanding of the role of the Change Trainer. It provided specific feedback on what worked and what areas that could be improved. I was able to feed this back to my people leader to show the quality of the work that was completed and open discussion on how improvements could be made. As the change delivered was not a popular one, it also provided context to the learner evaluations. It would be a particularly useful tool if you were not delivering traditional training but instead were creating collateral and learning resources to be used by the group. It is also useful to People Leaders to lead conversations in the GROW model.

### **Ongoing use of the survey form**

Survey has been run 6 times.

Collective responses stored with other evaluation data in teams as per new procedure

Key Results from 17 surveys on 6 Change Trainers:

I was satisfied with the level of information and documentation provided by the Change Trainer during their time on the project	<b>95.20%</b>
I was satisfied with the level of engagement and support offered by the Trainer to the project team	<b>97.20%</b>
In your opinion, did the training materials, collateral and/or engagement provide sufficient information to the learners (to adopt the change?)	<b>100%</b>

#### **Reflection:**

While the intent of the form was to run the survey at the end of Change Trainers time on the project, there has been benefit for us as a team to have group data to analyse together. Looking at the data collectively has enabled us to look for trends, promote our work and work collaboratively to ideate future improvements.

# Improvement 4

Improve



**ROOT CAUSE:** No documented peer feedback or self review process for continuous improvement

**COUNTERMEASURE:** Develop peer review process and guidance

**ACTIONS:**

- Document current process of peer review
- Ensure options for Peer review and self review are included in Change Trainer process map
- Research methods of review and include resources in documentation
- Draft document
- Send to Change Trainers for review and feedback
- Feedback: document covers current process with useful resources, but a workshop would be useful to develop the process further with examples (set as next steps)
- Final approval by [REDACTED]
- Senior Change Trainers to monitor process

**Final results:**

Peer review guidelines published and socialised

Future workshop planned to build on resources around peer review

# Change Training

## Peer and Self Review Guidance

### SUBMITTING WORK FOR REVIEW

Share the context and purpose of the change and the training that you are working on.

### CONSIDERATIONS

#### What would you like your peer/s to review?

- Documentation (e.g. LNA, Strategy or Planning)
- Presentation/s
- Atamai page
- Video
- Whole training package
- Training dry run
- Learner/User Guides
- Infographics
- Branding/Graphics
- Evaluations etc.

#### What would you like them to focus on:

- Delivery and presentation
- Proofreading
- Visual and design elements
- Accessibility
- Inclusivity
- Specific areas (e.g. evaluation)
- Technical (e.g. breakout rooms, activities)
- Te Ao Māori perspective
- Plain language
- Flow of information
- Connection to values
- Overall impression etc.

#### How would you like the feedback?

- Written feedback (e.g. comments in a Power Point)
- A conversation via meeting/teams/coffee
- Brainstorm/ideation session
- Loop/action table etc.

### REVIEWING WORK CONSIDERATIONS

What were they specifically wanting in terms of review?  
Understand intent, context and purpose of the change and the [training](#)  
What worked well?  
What would you like to see more of?  
Points for improvement  
What to focus on next (feedforward/professional development) etc.

### MODELS OF FEEDBACK AND REVIEW

[Teaching Excellence Through Mindful Reflection - Faculty Focus | Higher Ed Teaching & Learning](#)  
[Receiving and Giving Effective Feedback | Centre for Teaching Excellence \(uwaterloo.ca\)](#)  
[MindTools | Home](#) SWOT analysis  
[What Is Appreciative Inquiry? \(Definition, Examples & Model\) \(positivepsychology.com\)](#)  
[Retrospectives - What Went Well, What We Could Do Better \(alltheresponsibility.com\)](#)  
[Feedback and feed forward: developing lifelong learners | TeachWell Digital \(auckland.ac.nz\)](#)

## Outputs:

### Peer and self-review guidelines

Guidance published to Atamai page

## Improvement 4.

Peer review process + guide

### Next steps:

While Change Trainers have approved preliminary use of this guidance, we are planning a discussion session to further extend each of the considerations and provide examples. Needs overarching principles of Peer review added and, overarching policy guidance Also to decide if it should remain as guidance or be developed into a checklist or form.

The Atamai page contains an image and a link to this sharepoint resource

# Improvement 5

Improve



**ROOT CAUSE:** Lack of technology access or development for change trainer specific needs

**COUNTERMEASURE:** Research option for evaluation database

**ACTIONS:**

- Research options
- Look at Tirohanga Whānui Development as a potential solution
- Meet with Digital Workspace team to discuss options
- Formulate proposal
- Meet with [REDACTED] to discuss and see if supported
- Send proposal to Team Leads and Manager Change Enablement to see if supported
- Support received

**Final result:**

Proposal supported but is on hold during organisation wide change. To be revisited once new structure is in place

# Outputs:

## Research option for Evaluation Database

Proposal for use of Tirohanga Whānui to store evaluation data

**Improvement 5.**  
Research / evaluate databases

As part of Improve phase and ensuring that the gains that have been obtained in the Improve phase are maintained, I have proposed a technical solution for the storage, analysis and reporting of evaluations. This may not be able to be realised due to the current climate and changes underway within the business however the proposal has been discussed, and sized with the Digital Workspace team and is supported by them and the team Leads of Change Enablement.

Tirohanga Whānui, the Change Landscape tool currently stores information on change in a relational database. It records projects and initiatives across the business and includes information on the type of change, risk, and people involved. Activities are recorded against these Change projects/initiatives and data is fed through to several PowerBI dashboards and forms the Change Enablement dataverse.

The screenshot shows the 'Service Experience: Inspections' project details in the Change Landscape tool. It includes fields for Programme, Project Manager (Debbie Hampton), Change Manager (Nick Sharkey), Change Trainer (Karen Lyttel), and Project Status (Active). A table below lists changes, with one entry for TW-0203: 'Developing a Serviceflow form to replace the Cognito f...' with a start date of 12/4/2023 and end date of 12/6/2024.

The screenshot shows the 'Change Details' for TW-0203. The change description is 'Developing a Serviceflow form to replace the Cognito form currently being used for Heat...'. The start date is 12/4/2023 and the end date is 12/6/2024. The change aspect is 'Policy / Process, Tools' and the ADKAR phase is 'Awareness, Desire'. The change risk assessment is 'Low'. The restricted data toggle is set to 'No'. Below, a list of activities is shown, including 'Communications to Maintenance Partners', 'Training in new HREF for DHMC and Spotters', 'Change Impacts Assessment', and 'Stakeholder Mapping'.



In collaboration with the Team Leader Digital workspace, we formulated a solution proposal.

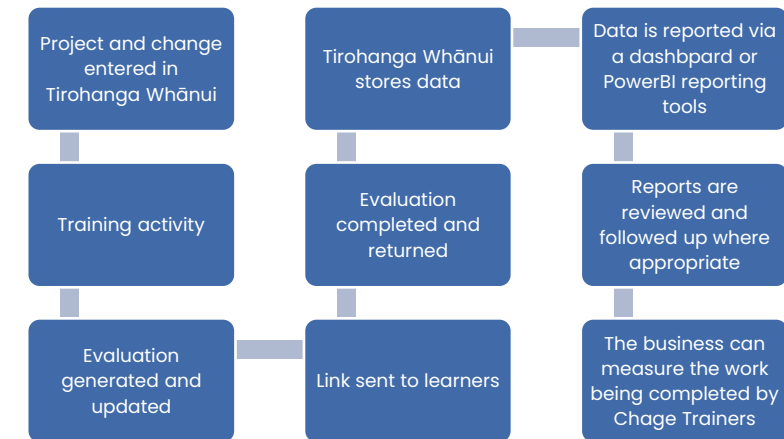
## SOLUTION PROPOSAL:

When a new activity is entered in Tirohanga Whānui, a tab would appear for **Evaluations**

Within this tab would be the two mandated Evaluation questions ('Quality of training' and 'Confidence to apply learning') and the ability to create new evaluation questions specific to the project. This would replace the current process of creating evaluations in Microsoft forms. Once the questions were compiled and saved a link would be generated that can be sent to learners. When learners receive the link, they log in, complete the evaluation and the information they enter is automatically stored in the Tirohanga Whānui database. From there a dashboard or PowerBI aggregate reporting can be generated, accessible to the business.

In this way evaluations can be easily accessed, are stored in a common area against other related data. Change Trainer work can be monitored (slide 9 – Completed Change task), and evaluations can be reviewed, compared, contrasted and stored over time. It would leverage current processes of recording activities and ensure consistency of practice as well as provide visibility (any gaps) which fits well into the intention and purpose of Tirohanga Whānui as a tool and the main driver of this project.

The screenshot shows a 'New Activity' form with a yellow box highlighting the 'Activity Details' tab. The form contains several input fields and a dropdown menu for 'Change Activity Audience'. The dropdown menu is open, showing options: Engagement, Workshop, Training, Coaching Session, Information Session, and Communication - Push. The 'Comms Channel Type' and 'Comms Channel' fields are also visible.



# Improvement 6

Improve



**ROOT CAUSE:** No current Process Maturity uplift planning or Risk mitigation

**COUNTERMEASURE:** Process for recording and mitigating risks, review of current improvements and planning of further improvements

**ACTIONS:**

- Workshop with Change Trainers on risk processes
- Needs Analysis drafted to include risk
- Propose extending Evaluation storage document to include risk and process Maturity uplift
- Present to Leadership team
- Approved and actioned within required documentation published and socialised

Final Results

- Risk/mitigations to be stored
  - Within Project risk register
  - Within Needs Assessment
  - CT wide risks to be noted in monthly meeting in 'Evaluation and Feedback Change Trainers' spreadsheet stored in teams
  - Template agenda created for Whanau Ako (monthly CT meeting) to ensure all elements are covered

## Improvement 6.

Process for risk recording/mitigation  
Process for reviewing uplift to capability

# Whanau Ako

Monthly Meeting Agenda

Date:

Present:

Apologies:

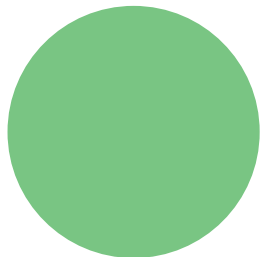
1. Team connection activity
2. Review minutes from last meeting
3. Review 'Evaluation and Feedback Change Trainers' spreadsheet
  - Update as needed and add any new data
  - Discuss current projects for each trainer, risks and issues
4. Process maturity uplift
  - Review any completed actions
  - Confirm actions underway
  - Discuss new actions required
  - Set task responsibilities and follow up dates
5. Show and Tell (current Project work underway)
6. Peer review requirements and planning
7. Other business
8. Confirm next meeting date and next chair of meeting (to be alternated)
9. Close meeting

# CONTROL contents

Control



Audit Learner evaluation and documentation storage  
Learner Evaluation Comparison Data  
Project Evaluation Comparison Data  
Atamai page and resources feedback results  
Other Improvements and Response Planning  
Summarising benefits  
Benefit mapping to strategy  
Next Steps



# AUDIT

## Learner Evaluations and Documentation storage

Control



<b>Trainers</b>	<b>8</b>
<b>Individual Projects</b>	<b>10</b>
<b>Events to be evaluated</b>	<b>16</b>
<b>Evaluation progress known</b>	<b>15</b>
<b>Unknown (defect rate)</b>	<b>1</b>

### Reflection:

7 Evaluations ran and documentation was stored correctly, and all had consistent scoring  
2 evaluations followed due process but did not have any results/response (from a small group of external surveyed learners)  
6 events were in progress and not at evaluation stage, but visible

1 evaluation that could not be located were by a CT no longer with the organisation

**Consistent scoring and access to data fully implemented by current trainers.**

### Results from the 7 Evaluations Audited



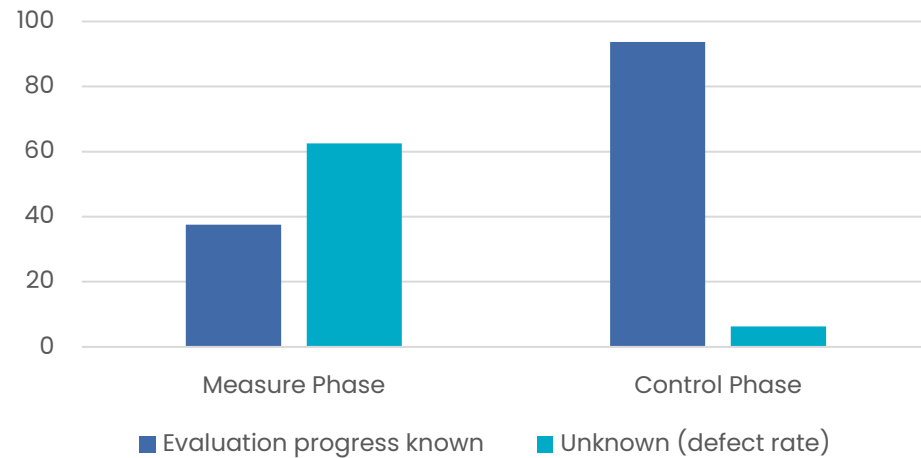
<b>Quality of training average</b>	<b>91.26%</b>
<b>Confidence to apply learning average</b>	<b>84%</b>
<b>Adherence to progress</b>	<b>93.8%</b>

# Learner Evaluation Comparison data

Control



Comparison



	Before	After
Units	24	16
Defects	15	1
DPU	0.624	0.0625
Zoverall	0.09	1.55
Zwithin	1.59	3.05

Z refers to Sigma level

	Measure Phase	Control Phase
Evaluation progress known	37.5%	93.75%
Unknown (defect rate)	62.5%	6.25%

# Project Evaluation Comparison data

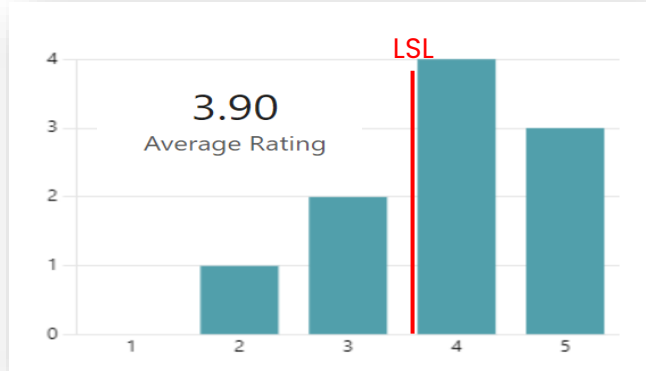
Control



**I was satisfied with the level of information and documentation provided to me by the Change trainer during their time on the project**

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes  
17 results

Measure Phase

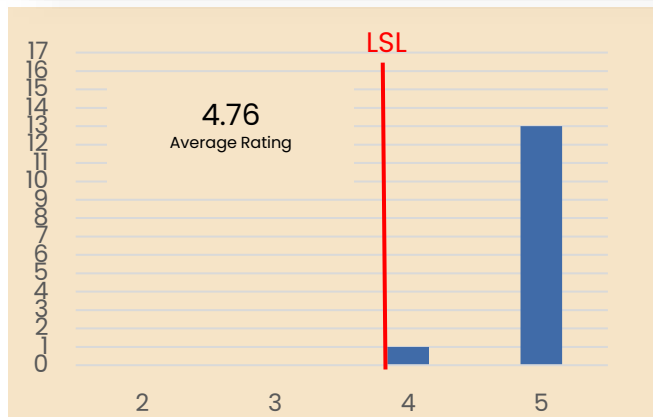


Sigma level 2

Require at least 6 sigma

Process Sigma Level Calculator - Discrete Data		
Sample Data (user inputs):		
Number of units	n	10
Total number of defects observed	d	3
Number of defect opportunities per unit	o	1
Sigma Shift (typically +1.5)		1.5
Results:		
Defects per Unit	dpu	0.3
Defects per Million Opportunities	dpmo	300,000.0
Defects per Opportunity	dpo%	30.00%
Yield	yield%	70.00%
Process Sigma Level	sigma	2.024

Control Phase



Sigma level 6

Require at least 6 sigma

# Project Evaluation Comparison data

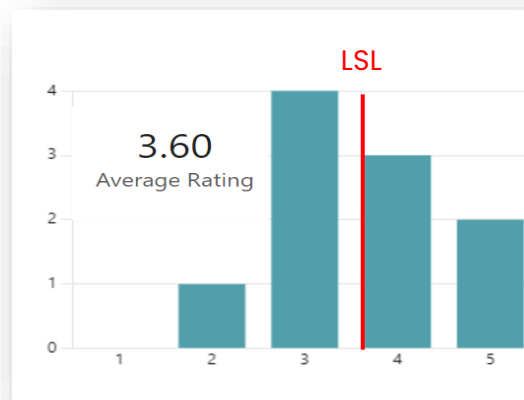
Control



**I was satisfied with the level of engagement and support offered by the Trainer to the project team**

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes  
17 results

Measure Phase

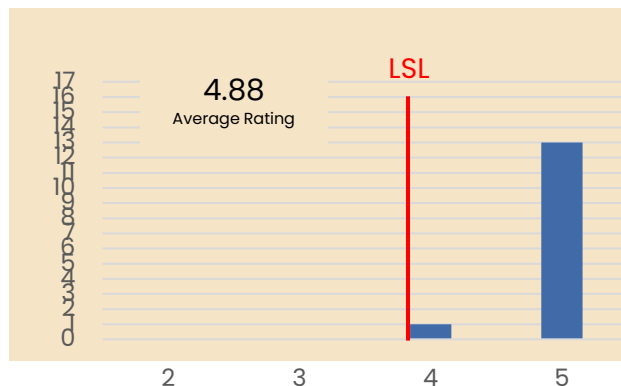


**Sigma level 1.5**

Require at least 6 sigma

Process Sigma Level Calculator - Discrete Data			
Sample Data (user inputs):			
Number of units	n		10
Total number of defects observed	d		5
Number of defect opportunities per unit	o		1
Sigma Shift (typically +1.5)			1.5
Results:			
Defects per Unit	dpu		0.5
Defects per Million Opportunities	dpmo		500,000.0
Defects per Opportunity	dpo%		50.00%
Yield	yield%		50.00%
Process Sigma Level	sigma		1.500

Control Phase



**Sigma level 6**

Require at least 6 sigma

# Project Evaluation Comparison data

Control

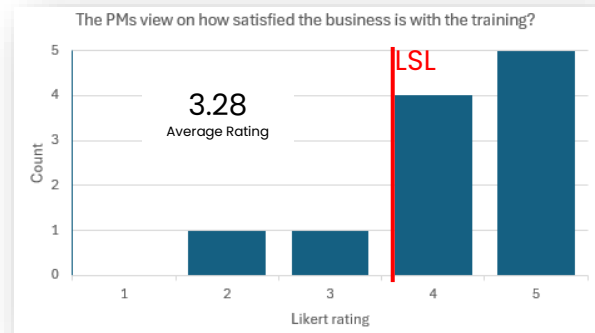


**Based on any feedback you received, how satisfied do you feel the business was with the level of and accessibility of the training**

The lower specification limit (LSL) is 4, i.e. scores of 4 or 5 are successful outcomes

14 results

Measure Phase

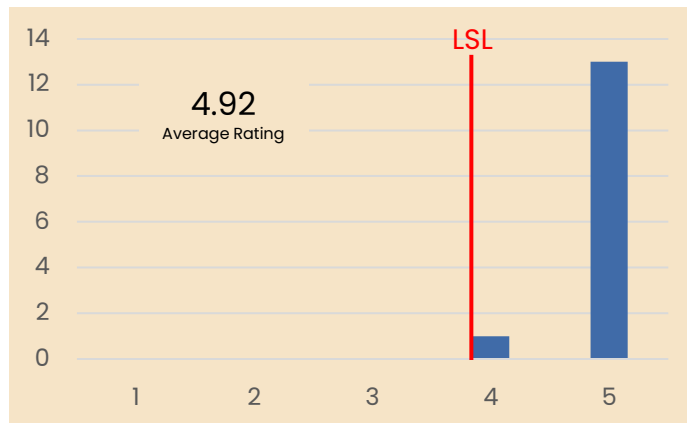


Sigma level 2.3

Require at least 6 sigma

Process Sigma Level Calculator - Discrete Data			
Sample Data (user inputs):			
Number of units	n		10
Total number of defects observed	d		2
Number of defect opportunities per unit	o		1
Sigma Shift (typically +1.5)			1.5
Results:			
Defects per Unit	dpu		0.2
Defects per Million Opportunities	dpmo		200,000.0
Defects per Opportunity	dpo%		20.00%
Yield	yield%		80.00%
Process Sigma Level	sigma		2.342

Control Phase



Sigma level 6

Require at least 6 sigma

# Atamai page and resources

## Feedback results

Control



### ATAMAI PAGE AND ASSOCIATED RESOURCES

Measuring this projects performance to ensure it continues to meet the projects intended benefits which were:

- Ability to improve the service offering by having clearly determined measures
- Able to share with the organization the value of the CE trainers
- Reputational uplift
- Help define what is expected from the CE trainers within projects

Atamai (Sharepoint) is available to everyone in the organisation. The page is linked to the Change Enablement Team page and has searchable tags including 'change' and 'training'. This is where the majority of the improvement collateral from this project lives.

Feedback on the page and the project from two of the Change Team Leaders (left) and the Manager Change Enablement (right).

Vednesday 11:18 am

Feedback

Overall, it was a very through, well researched paper. I dont have any specific feedback so no changes are required from me. I thought your actions were well thought out and you have a good understanding of where there are some gaps in overall project and change management processes within Kainga Ora which can make it difficult for Change Trainers to be as effective as you can be straight from the get go. i.e. a misunderstanding or misconception of the differences between CM and CT's. I also liked that you pointed out the CTs are not privy to overall lessons learned. In addition, I thought using Tirohanga Whanui to capture evaluation data was really smart. Its a great idea!



1

Yesterday 2:47 pm

Fantastic work Karen, throughly investigated and explained. I dont have any suggestions for change as I felt you delivered everything I needed to know.

Wednesday 11:19 am

thank you , much appreciated

Wednesday 11:31 am

Mōrena Karen, I've spent some time this morning reviewing your work. Wow, such a lot of work has clearly gone into this, and your passion for the project is evident. No changes that I can suggest. Just want to congratulate you on this mahi.



1

Wednesday 11:34 am

Thanks

# Atamai page and resources

## Feedback results

Control



### ATAMAI PAGE AND ASSOCIATED RESOURCES SURVEY

The Atamai page has an embedded feedback form (survey) and asks viewers of the page to complete the form after viewing the page. This survey will remain on the page as a control, with results analysed for future improvements (process maturity, improvement 6) to be made. The feedback form was based on the same survey that was run in the measure phase of this project. Questions asked in the form:

1. I understand the role a Change Trainer has in a project to both the project team and the way they work  
1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well
2. I understand the difference between a Change Trainer and a Change manager  
1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well
3. If applicable I would like to have a Change Trainer on my current or future project or team  
Yes/No
4. I understand the types of information, documentation and collateral that may be provided by a Change Trainer  
1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied
5. How useful do you think that the Change Trainer role is (including in delivering training materials, presentations, collateral, engagement) in supporting people's knowledge and ability? 1 = not at all | 2 = a little | 3 = somewhat useful | 4 = useful | 5 = very useful
6. I understand how a Change Trainer might support a project or team  
1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied
7. How important do you think training is to the successful rollout of change? (Change may be a new process, new legislation, a new tool, an update of technology, etc.).  
Not at all important | Not so important | Somewhat important | Important | Extremely Important
8. What do you think is most valuable about the role a Change Trainer plays in supporting people to change? Please select the top four things you value the most.  
List: critical thinking, Innovative collateral (Atamai pages, user guides, videography, infographics etc.), Putting the learner at the heart of the process, Facilitation of learning, Teamwork and collaboration, Skill gap analysis, Clear communication, Design work, Making learning accessible, Clear and accessible resources, Presentation skills, Planning and strategy, Relationship building (with SME's, project team, and/or learners etc.), Efficiencies
9. What else would be useful for understanding the work of a Change Trainer and the value they offer?  
Open text field

# Atamai page and resources

## Feedback results

Control



After approval from Team Leads and the manager of Change Enablement, communication has been sent out to project Managers and other members of Organisational Improvement (the business unit inside of which Change Enablement work). They were asked to review the page content and complete the embedded feedback form. As the feedback form was based on the original survey in Measure Phase, two questions can be directly compared:

I understand the role a Change Trainer has in a project to both the project team and the learners impacted by the change.

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

**42.5% increase in understanding**

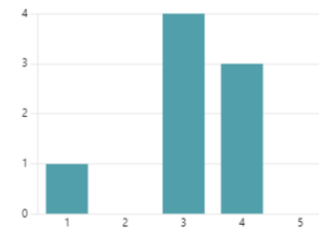
I understand the difference between a Change trainer and a Change Manager

1 = not at all | 2 = a little | 3 = somewhat | 4 = quite well | 5 = very well

**63.2% increase in understanding**

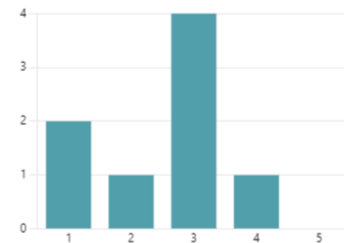
**Measure** survey 8 responses

3.13  
Average Rating



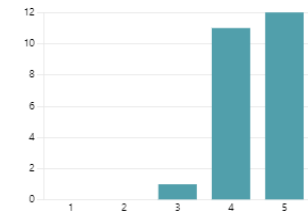
**Measure** survey 8 responses

2.50  
Average Rating



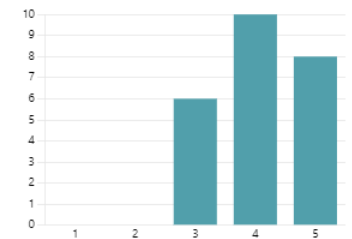
**Control** survey 24 responses

4.46  
Average Rating



**Control** survey 21 responses

4.08  
Average Rating



# Atamai page and resources

## Feedback results

### Control



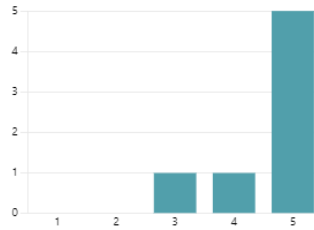
### Other responses from the feedback form

4. I understand the types of information, documentation and collateral that may be provided by a Change Trainer

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

[More Details](#) [Insights](#)

4.57  
Average Rating

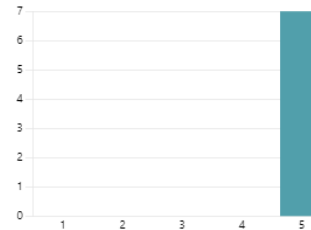


5. How useful do you think that the Change Trainer role is (including in delivering training materials, presentations, collateral, engagement) in supporting people's knowledge and ability?

1 = not at all | 2 = a little | 3 = somewhat useful | 4 = useful | 5 = very useful

[More Details](#) [Insights](#)

5.00  
Average Rating

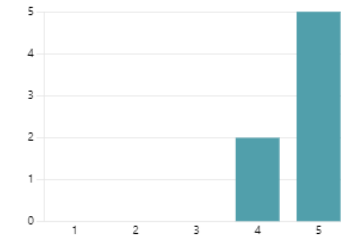


6. I understand how a Change Trainer might support a project or team

1 = not at all | 2 = a little | 3 = somewhat | 4 = satisfied | 5 = very satisfied

[More Details](#) [Insights](#)

4.71  
Average Rating



7. How important do you think training is to the successful rollout of change? (Change may be a new process, new legislation, a new tool, an update of technology, etc).

[More Details](#)

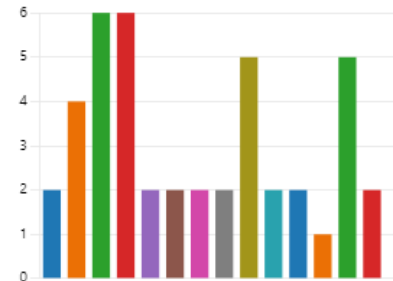
Extremely important	6
Important	1
Somewhat important	0
Not so important	0
Not at all important	0



8. What do you think is most valuable about the role a Change Trainer plays in supporting people to change? Please select the top four things you value the most.

[More Details](#)

Critical thinking	2
Innovative collateral (Atamai pa...	4
Putting the learner at the heart ...	6
Facilitation of learning	6
Teamwork and collaboration	2
Skill gap analysis	2
Clear communication	2
Design work	2
Making learning accessible	5
Clear and accessible resources	2
Presentation skills	2
Planning and strategy	1
Relationship building (with SME...	5
Efficiencies	2
Other	0



9. What else would be useful for understanding the work of a Change Trainer and the value they offer?

Listing the benefits of the value you add, also how people can engage with you, what part of the project, can they contact you if they have questions about up-and-coming projects etc. e.g.: contact info

I think the resource page you have developed is great. I do think there needs to be clearer messaging around the difference between change trainer and change manager though as I would be concerned if people think they only need a change trainer on a project.

A discussion of how they could assist our team




# Atamai page and resources


## Feedback results

Control




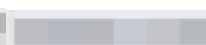

### Other feedback on the page (emailed or messaged):


   
To:  Karen Lynley

 You replied on Tue 6/18/2024 3:15 PM

Wow! It looks absolutely amazing. I love your videos, and I am blown away by the quality of the work in all of the examples of people's collateral. I think it shows a quantum leap since I was in the team, in how you are all using technology and design to create incredible pieces of learning. I will be shamelessly stealing some of the design ideas from you and your team. I have only had time for a quick blast through today, but I will definitely be back to it, and will recommend that the rest of my team have a look too.




I am in awe of you. Massive **congratulations** of an epic piece of work.


   
To:  Karen Lynley

 You replied on Wed 6/19/2024 8:13 AM

Hi Karen




Looks fab and is clear and informative.

   
To:  Karen Lynley

 You replied on Fri 6/21/2024 10:31 AM


Hi Karen

Amazing page of resources you have created – well done!


   
To:  Karen Lynley

All done


Love love love – especially the below, my visual eye was drawn to these bite sized examples of what Change trainers do 😊

 **Workshops**


- Connection face-to-face
- Cross functional
- Generates discussion and ideas
- Active, participatory

 **FAQs**


- Responsive
- Can be made searchable
- Provides indirect feedback
- Directs production of other learning resources

 **Viva Engage**

- Orig wide reach
- Conversational
- Interactive, mimics
- Dependant on ind

 Friday 9:40 am

Your Change Training page is amazing Karen. Well done. I learnt alot.

 1



# Other improvements and response plans

## **Proposal for use of Tirohanga Whānui to store evaluation data**

If this proposal were to go ahead, then the reporting from this data would provide a control measure for future Change Trainer work. It would allow monitoring of progress and provide the basis for future improvements. It would allow visibility of the results across the business and especially for People Leaders to see the work Change Trainers do within projects and how this is being received.

## **Response plans**

Feedback form on the Atamai page will be monitored and reported via the NZ Change team monthly meeting. I am responsible for this reporting, though this can be handed over to another Senior Change Trainer if required. Actions required from this reporting will then be generated through discussion in that meeting and recorded and re-raised where necessary by the Admin role who minutes this meeting. Outside of regular update to collateral as new projects are completed, the page will have an annual review by myself as Author. Reminders for this are generated by Sharepoint. Updates will be reported to the leadership team.

People leaders are responsible for response to low feedback scores or lack of reporting of evaluations. Steps are to review results, meet with Change Trainer to discuss, determine what support is required and follow up on actions. Step one is always a discussion to determine context.

Senior Change Trainers are responsible for Peer feedback review outcomes. Steps are to determine any follow up required, offer support if needed, escalate to People leader if necessary.

# Summarising the benefits realised

Control



Before	After	Uplift benefit
Unknown what to expect from CT in projects – what do they do, what are the deliverables?	Improved service offering by defining CT process and possible deliverables. <b>42.5% increase in understanding of what Change trainers offer</b>	<ul style="list-style-type: none"> <li>• Reputational uplift</li> <li>• Utilisation of CT skills</li> <li>• Less time spent clarifying roles and responsibilities</li> <li>• Greater uptake of CT as support options for learners</li> </ul>
Cannot show the value that Change Trainers offer to learners	17 responses from Project team members <b>100% agreement that the training materials, collateral and/or engagement provided sufficient information to the learners (to adopt the change)</b>	<ul style="list-style-type: none"> <li>• Increased visibility of support for learners/those impacted by change</li> <li>• Increase Change Capability</li> <li>• Change processes viewed more positively (reducing resistance to change)</li> </ul>
78% project satisfaction with the level of engagement and support offered by the Trainer to the project team.	97.6% satisfaction with <b>the level of engagement and support offered by the Trainer to the project team.</b>	Greater engagement and understanding of the CT role meant they were better utilised in the project
Lack of easily accessed collateral templates for new/existing CT to use within projects.	Readily accessed collateral for CT use, including document storage guide, Peer Review guide, Learner Needs Assessment, Change Strategy template, template survey questions and professional development links	Greater access to documentation and collateral that support CT to mahi tahi. ROI is able to be measured and shown
Unable to support uplift in capability as it is unknown where issues lie. Recording of evaluation data is at <b>37.5%</b>	Accurate recording of evaluation data is now <b>93.75%</b> ensuring we able to see where issues or challenges lie	More focussed and accurate capability uplift planning due to visibility of issues

# Benefit mapping to strategy



# Next steps

Control



## Green Belt Project Documentation

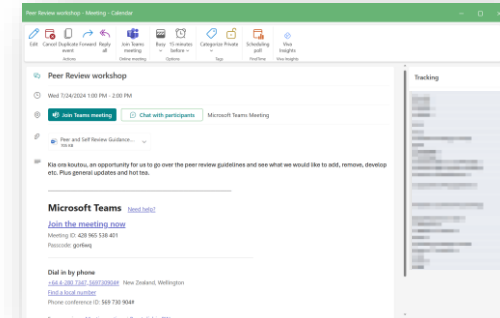
Final documentation will be sent to the Change Leadership team. It will also be made available on the Change Training Atamai page until the end of the Organisational restructure to give context to why the page exists.

## Peer review

Workshop planned to review guidance and add resources, detail and examples. Set for 24 July 2024

## Video or other resource for Change Managers

Request has been recieved for further resource development to support Change Managers. This is outside the scope of this project, however, it has value for Change Enablement and will be explored further.





# Thank you

to everyone who has supported this  
mahi to uplift the mana of the  
Change Team and Change Trainers

Ngā mihi nui!

Any queries, please contact

Karen Lynley

Senior Change Trainer

[karen.lynley@kaingaora.govt.nz](mailto:karen.lynley@kaingaora.govt.nz)