

	Local Government Change Management Model and Online Learning Platform Implementation Guide	Deliverable Nature D3.3
		Dissemination level PU
Contract Number 619347		Version 1.0

EAGLE
EnhAnced Government LEarning

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Objective 8.2 Technology-enhanced learning;

Target outcome c): Holistic learning solutions for managing, reaching
and engaging learners in the public administrations

Deliverable D3.3

**Local Government Change Management Model and
Online Learning Platform Implementation Guide**

WP3 – Change
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Glossary

EAGLE	EnhAnced Government LEarning
EC	European Commission
EU	European Union
FP7	Seventh Framework Programme
OER	Open Educational Resources
FP7	Seventh Framework Programme
WP	Work Package

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Executive Summary

In order to support local administration in managing organisational changes related to learning and knowledge sharing platform implementation, a change management methodology has been developed (Deliverable D.3.1). A first version has been tested with users from Luxembourg and Montenegro (Deliverable 3.2). Based on feedbacks from first users, modifications have been made to ensure better understanding and usability of the method. And, in order to facilitate learning, its content has been divided and made available as Open Educational Resources (OER).

This Deliverable is organised as follows

1. Regarding feedback collected during experimentations with Luxembourgish and Montenegrin users, improvements have been made to the method which now is called Local Government Change Management Method. Improvements made are described in the first part of this deliverable
2. To ensure its learning, Local Government Change Management Method has been divided into 30 Open Educational Resources. Each of them is at least connected to one other OER. The second part provides description and linkage of these OER.

Need for the Deliverable

One of the prerequisites for successful adoption of OLP by local administration is change management (Deliverable D.2.2). For local administrations that need support to manage change, a set of Open Education Resources

on Change Management are now available on the EAGLE platform.

Objectives of the Deliverable


The objective of this deliverable is twofold. In order to increase its usability and learnability, modifications have been made to Change Management method. The first objective of this deliverable is to introduce these modifications. The second objective is to describe OERs that make up Local Government Change Management Model.

Outcomes

There are two outcomes associated with this deliverable. The first one is about the new version of the Change Management method: Local Government Change Management Model. The second outcome consists in the breaking down of this new Change Management method into a set of OERs. All these OER have been uploaded on the EAGLE Platform, and are now available for local administrations.

Next steps

All OERs related to Local Government Change Management Model have been edited by using the EAGLE Wiki. A wiki is a webpage or collection of webpages designed to enable anyone who access it to contribute or modify content. Knowledge on Change Management is not exhaustive and it is likely to evolve regarding specific contexts. Anyone who will use these OERs are supposed to improve them continuously.

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1 Introduction

EAGLE aims at introducing an open learning and knowledge sharing platform in local public administrations. One of the prerequisites for successful adoption of this platform by such organisation is to manage changes required to ensure a successful adoption of the platform. The study of barriers to the introduction and use of technology enhanced learning in local administration's organisational context (Deliverable D.2.2, p. 5) shows there is 1) No established learning process, 2) No availability of learning content; 3) Changes but no change management and 4) Lack of digital literacy skills. To overcome the third barrier, the EAGLE team has developed a methodological framework for change (MFC) – also called Local Government Change Management Method. Its purpose is to support local administration in managing organisational changes related to learning and knowledge sharing platform implementation. A first version of this methodological framework has been released (Deliverable 3.1) and tested with users from Luxembourg and Montenegro (Deliverable 3.2).

The objective of this last deliverable is twofold. Based on both lessons learnt from experimentation and remarks made by project members, several modifications have been applied to the initial version of the method. First objective of this deliverable is to introduce these updates. In the context of the EAGLE project, Change Management is a critical skill. It means that local administration should learn how to change in order to always fit with evolving citizen expectations. To enhance local administration ability to change, the Local Government Change Management Method has been adapted to be easier to learn. Second objective of this deliverable is to present learning version of this methodological framework for change.

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2 Improvement of Local Government Change Management Model Guide

The Local Government Change Management Model Guide aims at providing support to any local organisation in managing change related to the implementation of a learning and knowledge sharing Platform. An initial version has been released and tested with Luxembourgish and Montenegrin municipalities. Based on feedbacks from both these two pilots¹ and project members and reviewers, three modifications have been made in order to improve usability² of the method.

The first modification is directly inspired by remarks made by project reviewers. They expressed regret regarding the absence of a **way to establish a baseline from which progress assessment of change implementation can be made**. The second one is about the **architecture of the method**. Initially, the method was structured along a four step process (Analyse, Plan, Do, Improve). Baseline establishment and others considerations on stakeholder engagement have resulted in a new architecture of the method. Third modification is related to **additional learning pathway related to bottom-up change approach**. Each of this modification is detailed below.

2.1 Establishing an “as is” baseline

In their first review, reviewers mentioned the absence of an *as is* baseline against which the success of the platform implementation can be empirically assessed. In response to this remark, an assessment tool has been developed and added to the methodological framework for change.


In Change Management, “as is” refers to the company’s current situation. It could be described regarding both company’s market positioning and company’s organisation. It is used as the starting point to design and plan what changes are required to achieve an expected situation. The number of users and OERs provide an incomplete measure of implementation success. It is necessary to add some information about organisational changes that have been achieved to get a better appreciation of achieved transformations.

The assessment tool we developed and added to the method aims at supporting the “as is” definition. Called “Readiness to Change for Learning and Sharing Platform”, this tool consists in organisation positioning regarding six organisational dimensions (Strategy – Culture – Process – People – Technology – Infrastructure). These dimensions have an impact on the adoption of a learning and sharing knowledge platform as the EAGLE solution. These six organisational dimensions are assessed by using a five point scale. The lower end of the scale means that the organisational dimension is assessed against the adoption of the learning platform. Next points reflect readiness at respectively individual, group, organisational and local level. Results of the assessment are displayed in form of radar chart.

The readiness assessment tool provides an organisational “as is” baseline. Its comparison with new measure made throughout the change project can empirically reflect organisational transformation progress. It has to be performed at the beginning of the change project. Accordingly, it is now the starting point of the methodological framework for change.

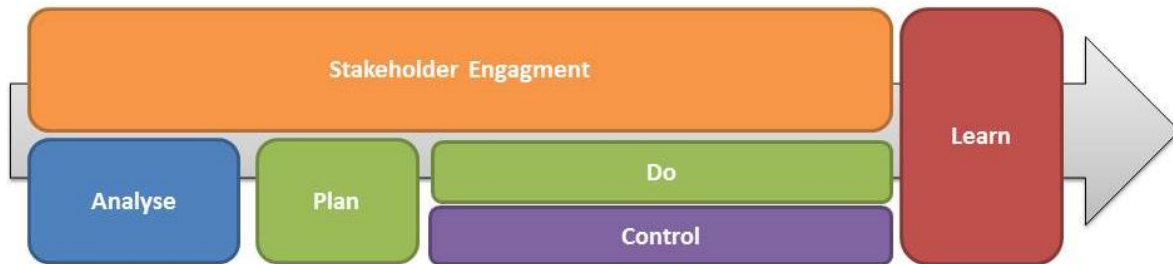
¹ Deliverable 3.2 provides a complete description of testing approach and results.

² Usability is generally defined as the ‘ease of use and learnability of an artifact’ (<https://en.wikipedia.org/wiki/Usability>).

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2.2 Structure of the content

In the first methodological framework for change release, content was organised according to a four-step process (Analyse, Plan, Act, Improve) and a transversal activity (communicate). The new release modifies this view by adding two other process steps: stakeholder engagement and control.



Local Government Change Management Model

FIGURE 1: LOCAL GOVERNMENT CHANGE MANAGEMENT MODEL

For a long time already, stakeholder engagement has been presented as a key condition for the success of any change initiatives³. No change can succeed if stakeholders are not properly engaged. For this reason, it seems wiser to address stakeholder management issues in a dedicated step. Stakeholder engagement is “the process by which an organisation involves people who may be affected by the decisions it makes or can influence the implementation of its decisions”⁴. It is essentially expressed through communication between one entity or group to another. Accordingly, initial transversal activities “communicate” has been integrated to this new process step.

Another existing set of activities has been highlighted in the new release: control. Initially, at the end of each step, it was asked to establish how the change management process is proceeding. To do so, *Stakeholder Change Management Barometers* have been introduced. As its name suggests, this barometer is essentially focused on stakeholder engagement and, consequently, will be linked to the previous new step. Additional assessing measurement and trends that may affect change progress have now been included. They are related to organisational dimensions transformation as stated in the Readiness Assessment Tool. Control process should be performed throughout the change project⁵. The continuous application of this process provides an accurate and current description of change project progress.

2.3 Bottom-up change initiative: a second learning pathway


A last modification has been applied to first methodological change framework. This modification is about individual adoption of learning and knowledge sharing platform.

Organisational structure of local government is close to what Mintzberg (1982) called a bureaucracy. In such organisation, the decision-making process is centralised. Top-level managers have a tre-

³ See for instance Becker H.S. (1960), Notes on the Concept of Commitment, *American Journal of Sociology*, Vol. 66, pp. 32-40.

⁴ https://en.wikipedia.org/wiki/Stakeholder_engagement.


⁵ ISO (2012), ISO 21500:2012 – Guidance on project management, http://www.iso.org/iso/catalogue_detail?csnumber=50003.

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mendous control over organisational structure decisions. This why the methodological framework for change was initially designed to support a top-down change management approach. Top-down change management approach implies that decisions are made and changes imposed form the top with no or little input from local public servants.

EAGLE project's deliverable 2.1 identifies barriers and challenges of enhanced learning solution adoption by local government. One of these is the availability of learning content. If there is no relevant learning content available on the platform, it will not be easy to convince top-level management to implement it. Therefore, Change Management Guide should go beyond the "top-down" change management approach by providing guidance to individuals who want to use the platform to create learning content. Accordingly, the second change management guide release includes a second learning pathway dedicated to bottom-up change initiative.

In order to support bottom-up change initiatives, new learning content has been added to the methodological framework for change. This content is part of a three-stage strategy to ensure bottom-up adoption of learning and sharing knowledge platform. The first step is dedicated to knowledge community development and set-up. The second step aims at supporting knowledge resources building. And finally, the last one addresses issues to cope with in order to spread learning and sharing knowledge platform at an organisational level.

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3 OER-based Recommendation Guide for Change and OLP Implementation

In order to improve Local Government Change Management Guide and OLP Implementation accessibility and use, it has been divided into 30 Open Educational Resources. Among these OERs:

- 9 are related to “Stakeholder Engagement” process step;
- 6 are related to “Analyse” process step;
- 5 are related to “Plan and Do” process step;
- 3 are related to “Control” process step;
- And 7 are related to “Improve” process step.

Each of these OERs is at least linked to one other OER in order to establish personalized learning pathways.

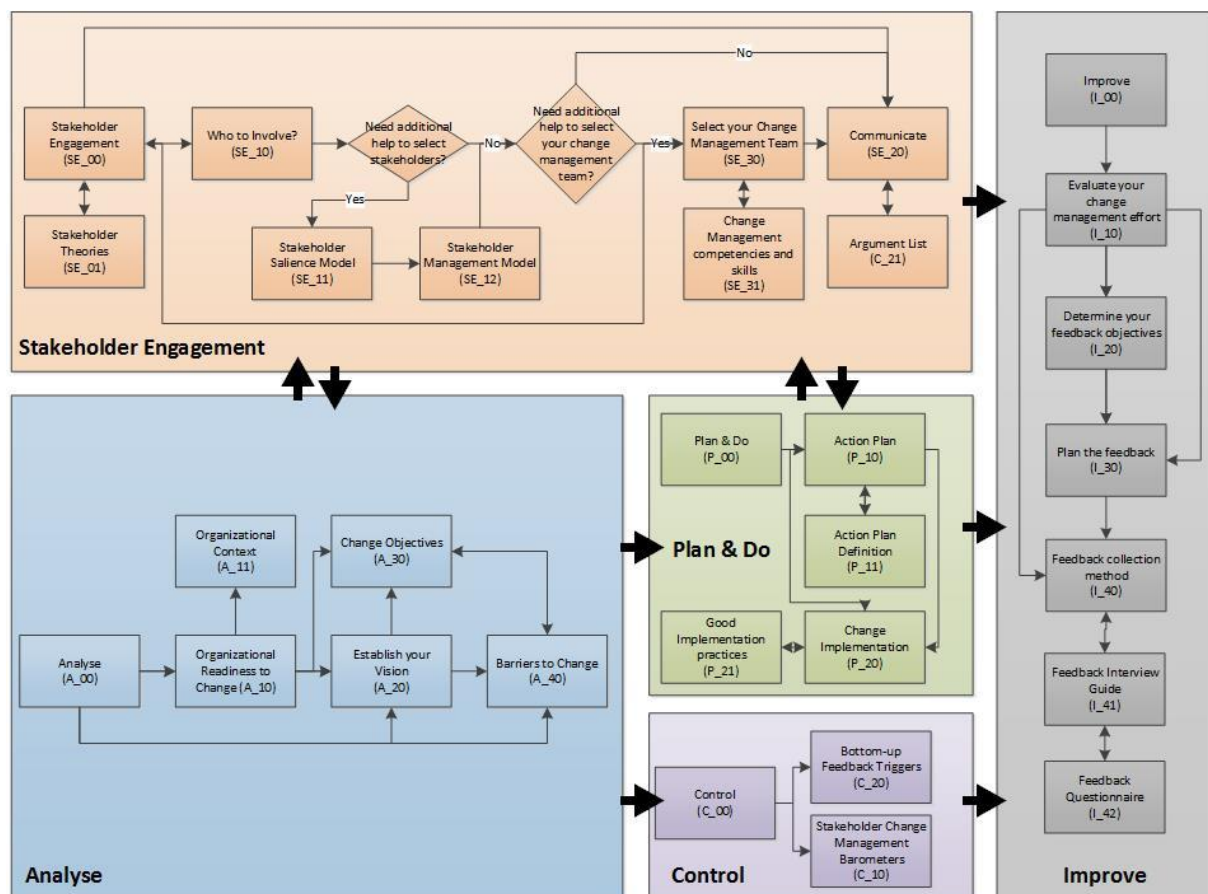


FIGURE 2: LOCAL GOVERNMENT CHANGE MANAGEMENT GUIDE OERS

Four more OERs have been created. Two of them aims at introducing respectively Change Management principles and Local Government Change Management Model. In respect to the third improvement made to guidelines, the other two aims at supporting individuals to develop both Knowledge Communities and Knowledge Content.

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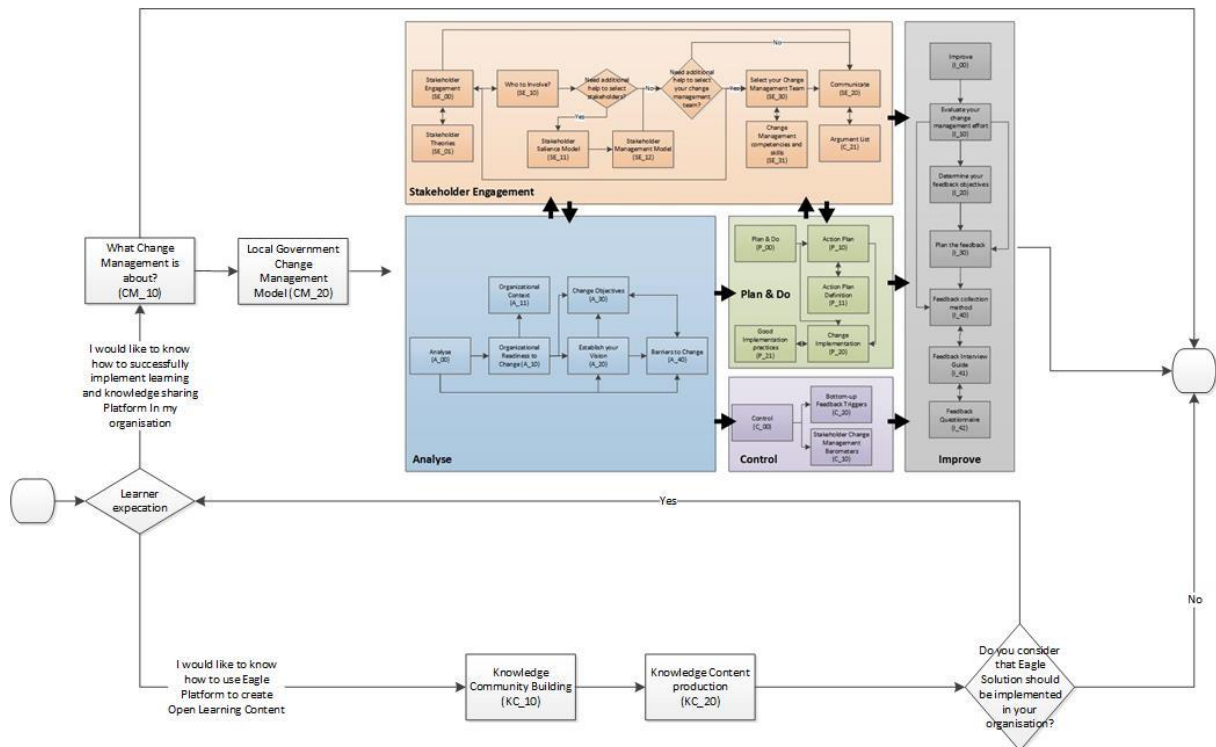



FIGURE 3: OVERVIEW OF ALL OERs RELATED TO LOCAL GOVERNMENT CHANGE MANAGEMENT MODEL

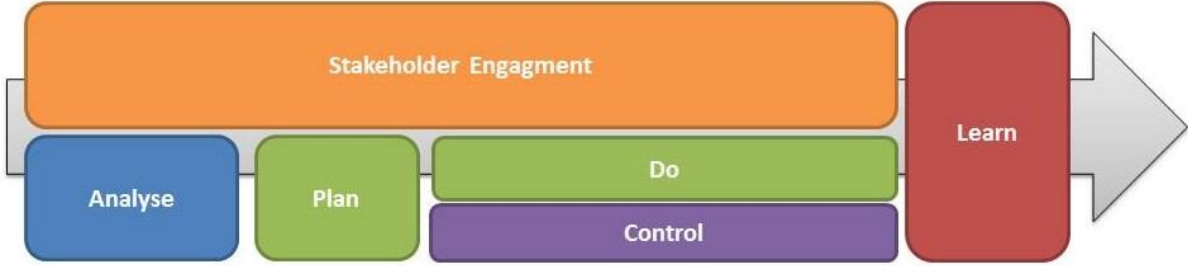
3.1 Local Government Change Management Introduction


3.1.1 CM_10 – What Change Management is about

OER#	10	Title	What Change Management is about
Incoming Link	▪	Outgoing Link	▪
<p>If you are wondering what Change Management is all about, let's have a look at the enclosed slideshow.</p> <p>If you want to learn more about how to manage changes required to enhanced learning and knowledge sharing at work, Local Government you should have a look at the Local Government Change Management Guide [CM_20].</p>			
Related Assets	▪ What Change Management is about.pptx		

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3.1.2 CM-20 – Local Government Change Management Guide

OER#	CM-20	Title	Local Government Change Management Guide	
Incoming Link	<ul style="list-style-type: none"> CM_10 		Outgoing Link	<ul style="list-style-type: none"> A_00 SE_00
<p>To help you to ensure the successful adoption of a learning and knowledge Sharing platform, a change management methodology has been developed as part of the Eagle project. Enclosed slideshow will give you an overview of this methodology also called Local Government Change Management Guide.</p>				
				
<p>FIGURE 4: LOCAL GOVERNMENT CHANGE MANAGEMENT GUIDE: A PROCESS VIEW</p>				
<p>Ready to start you change management journey? It starts either at the Analysis [A_00] stage or at the Stakeholder Engagement [SE_00] stage. Whatever your choice you will need to pay attention to both of these two stages.</p>				
Related Assets	<ul style="list-style-type: none"> Local Government Change Management Model.pptx 			

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3.2 Analyse

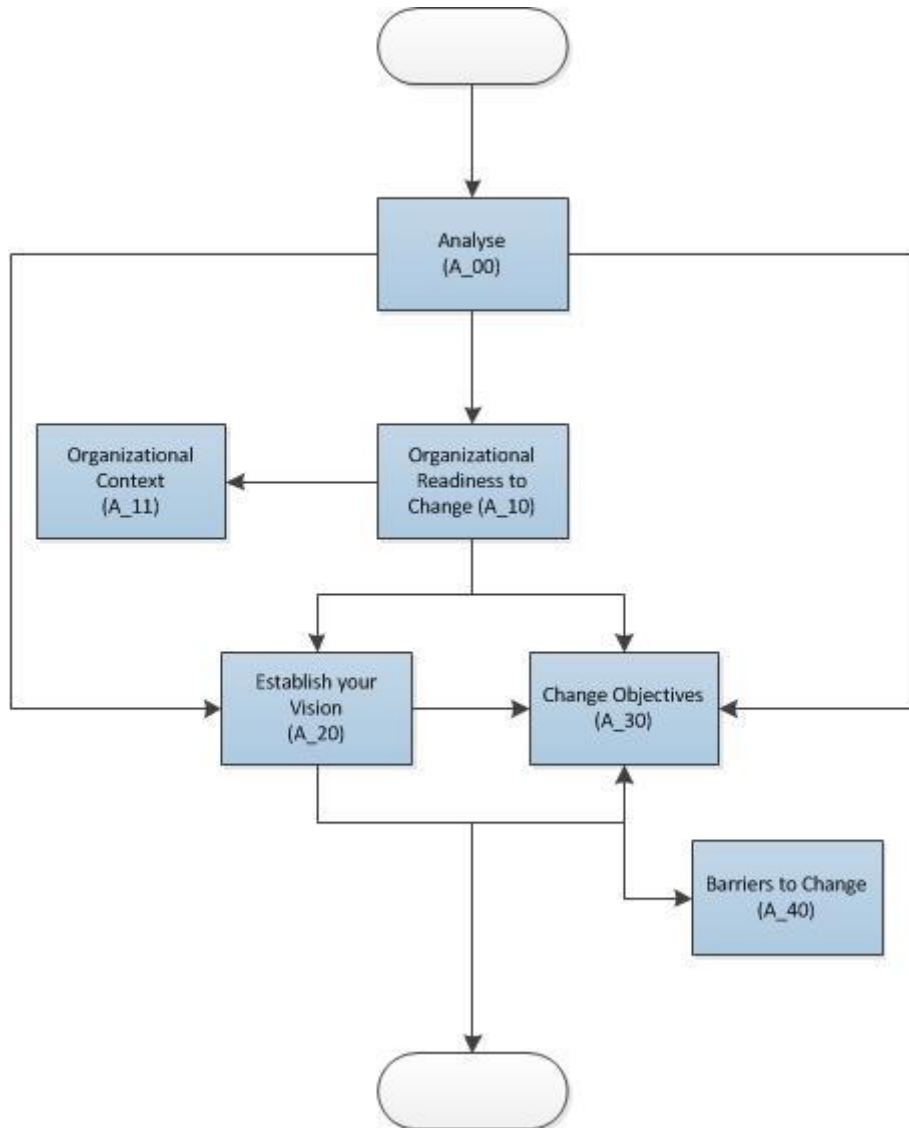



FIGURE 5: OVERVIEW OF OERs RELATED TO ANALYSE STAGE

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3.2.1 A_00 – Change Management – Analyse

OER#	A_00	Title	Analyse
Incoming Link		<ul style="list-style-type: none"> ▪ CM_20 	Outgoing Links <ul style="list-style-type: none"> ▪ A_10 ▪ A_20 ▪ A_30 ▪ A_40 ▪ SE_00
<p>This stage aims to analyse the context in which the learning and knowledge sharing platform will be implemented (which actors, what type of organisation, what vision of the change) in order to be able to:</p> <ul style="list-style-type: none"> • Establish your current situation by using the Readiness Assessment tool [A_10] • Define your vision [A_20] (desired situation) and identify the gaps between the current and desired situations • Define a set of specific objectives [A_30] that you wish to achieve in a given period of time, regarding introduction of the learning and knowledge sharing platform • Identify the potential barriers [A_40] to be overcome for a successful adoption of the learning and knowledge sharing platform in your organisation. <p>It is recommended to involve your main stakeholders [SE_00] to perform these different activities.</p>			

3.2.2 A_10 – Organisational Readiness to Change Assessment

OER#	A_10	Title	Organisational Readiness to Change Assessment
Incoming Links		<ul style="list-style-type: none"> ▪ A_00 ▪ A_11 ▪ A_20 	Outgoing Links <ul style="list-style-type: none"> ▪ A_11 ▪ A_20 ▪ A_30
<p>To fully take advantage of Eagle Solution, certain organisational conditions must be met. Organisational conditions are related to:</p> <ul style="list-style-type: none"> • Strategy • Culture • Processes • People • Technology • Infrastructure <p>If you wish to know whether your organisation is ready to take advantage of the EAGLE Solution, you can perform an assessment of your organisation's readiness to change by using the Readiness to Change Assessment Tool we have developed.</p>			

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Readiness to Change Assessment Tool

The Readiness to Change Assessment Tool consists in positioning your organisation regarding 6 organisational dimensions that influence adoption of a Learning and Sharing Knowledge Solution like EAGLE. These 6 organisational dimensions are assessed by using a five point scale (To get more information about this scale, please have a look at the assessment grid below).

To fully take advantage of the EAGLE Solution, each dimension shall reach an assessment score of at least 3. All scores lower than 3 imply that you need to make changes before implementing the platform. Accordingly, this assessment should help you to:

1. Get a better view of our organisational capacity to take advantage of the EAGLE Solution
2. Identify [what you need to change](#) [A_30] in order to ensure adoption of the Eagle Solution and to define your [vision](#) [A_20] on learning and knowledge sharing in your organisation.

How to make an assessment of your organisational readiness to change for EAGLE?

We recommend to use the enclosed excel file we developed to perform the assessment.


To make an assessment of your 6 organisational dimensions, you just have to fill in the first worksheet called "Assessment". For each organisational dimension, you should select among 5 positions. Take care to select only one position for each dimension assessed.

Results will display in the second worksheet called "Results".

Readiness to Change for Learning and Sharing Knowledge Solutions – Assessment grid

Organizational Dimensions		0	1	2	3	4
Strategy	<i>To what extent Learning and Sharing Knowledge is an important part of the strategy of your organisation?</i>	Learning and knowledge sharing activities are not part of the strategy of the organisation	Only some people in organization consider learning and sharing knowledge as necessary to achieve expected results	In some teams / department, learning and sharing knowledge activities are considered as necessary to achieve expected results	Organisation's strategy statement highlight learning and sharing knowledge activities as one of the key conditions to achieve expected results	At regional and national level, learning and sharing knowledge are recognized as one the key conditions to achieve expected results.
Culture	<i>To what extent Learning and Sharing Knowledge is part of the culture of your organisation?</i>	Organizational culture does not support learning and sharing knowledge	At individual levels, some employees quite naturally learn and share knowledge.	In some teams / departments, people are expected to adopt learning and sharing knowledge behaviours.	Learning and sharing knowledge behaviours are explicitly recognized as a cultural aspect of the organization	Learning and sharing knowledge are common values shared by a majority of organization's stakeholders
Processes	<i>To what extent knowledge required to perform organizational activities are managed?</i>	Organisation's activities are defined in any processes or procedure	Some organisation's activities are modelled as a process	A majority of organisation's activities are modelled as a process and, for some of them, required knowledge is identified.	Terms of acquisition and learning of required knowledge to perform a majority of organisation's activities are defined and managed	Some organisation's stakeholders are involved in management of knowledge required to perform organisation's activities
People	<i>To what extent members of your organization are encouraged to learn and share knowledge?</i>	There is no incentives to support people in learning and sharing knowledge activities	The desire for learning and sharing knowledge is based on individual motivations	Some teams / department have set up incentives to encourage learning and sharing knowledge activities	Incentives for learning and sharing knowledge are defined and implemented at organizational level	Incentive for learning and sharing knowledge are defined and implemented at regional and/or local level
Technology	<i>To what extent do you use technology to support learning and knowledge sharing?</i>	Any learning and sharing platform is used	Some employees use online technologies to learn and share knowledge	Some teams / department use online technologies to support learning and sharing knowledge	At organizational level, there is an online platform to learn and share knowledge	An online platform to learn and share knowledge is available at regional or local level.
Infrastructure	<i>To what extent members of the municipality have an access to web</i>	Employees do not have access to web technologies	Only certain employees have access to web technologies by using their own devices	Only in some team and department, all employees have access to web technologies	Organisation guarantees to all its members access to web technologies	At regional and/or local level the rate of internet equipment is high.

FIGURE 6: READINESS TO CHANGE FOR LEARNING & SHARING KNOWLEDGE SOLUTIONS ASSESSMENT GRID

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One of the most crucial success factors for ICT implementation in organizations is the level of coherence between the different organisational dimensions. It is therefore particularly important to provide an adequate organisational context for the introduction of a learning and knowledge sharing platform in the public sector. Different organisational areas require specific attention when implementing new ways of learning and sharing knowledge in the organization, in order to use the new technology in an efficient way (for more details, see [Organisational Context](#) [A_11]).

Related Assets	<ul style="list-style-type: none"> ▪ EAGLE_Readiness to Change Assessment tool.xls
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3.2.3 A_11 – Organisational context: a contingency approach

OER#	A_11	Title	Organisational context: a contingency approach	
Incoming Link		<ul style="list-style-type: none"> ▪ A_10 	Outgoing Link	<ul style="list-style-type: none"> ▪ A_10 ▪ SE_00 ▪ P_00

If we refer to contingency theories (Mintzberg, 1982; Pichault & Nizet, 1995), one of the most crucial success factors for ICT implementation in organisations is the level of coherence, or contingency, between different organisational subsystems. Several authors highlight the importance to provide an adequate organisational context for the introduction of e-learning in the public sector. They identify different organisational areas which require specific attention when implementing e-learning in the organisation. For instance, in terms of people management, there is a need to "take into account the profile of target learners (i.e. public servants), the exact learning goals to be achieved, and the type of training services/content the project will offer" and to develop a "contextualised approach regarding users' needs" (Lambrou & Marianos, 2008). An important identified success factor is also the line managers' effective support. Line managers must be willing to empower their employees and to trust them, which induces also that the organisational culture enables and fosters adequate values, attitudes and behaviours. Organisations processes must also enable line managers to be involved and familiar with the training material which their employees have been exposed to, and to organise feedback and discussion about the learning and its transfer into the workplace (Raliphada et al. 2014).

The implementation of open learning and knowledge sharing platforms also require "available financial resources, commercially available technology platforms and learning environments and "accessibility" of e-learning solution vendors/consultants" (Lambrou & Marianos, 2008). Authors also insist on the necessary coordination among these different dimensions, in order to use the new technology in an efficient way (JISC, 2005; Lambrou & Marianos, 2008; Raliphada et al. 2014). This constitutes a "shift from a technology-driven approach to include political support, organisational adaptability as well as change management aspects, success factors often neglected in earlier projects" (Lambrou & Marianos, 2008).

The contingency approach is relevant for our change management, as the introduction of new learning and knowledge sharing practices takes place in an existing public organisational context, with specific characteristics. To ensure the adoption of these new practices within this specific organisational context, it must be determined to what extent different organisational subsystems (vision / goals, people management, processes / procedures, buildings / infrastructure, culture, and technology) can more or less evolve, to support the change process (cf. Figure below).

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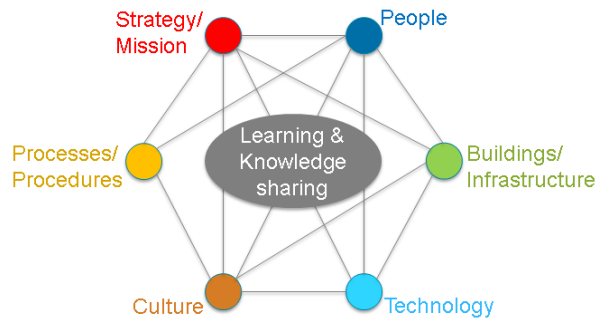



FIGURE 7: THE ORGANISATIONAL DIMENSIONS

We use the contingency model as a basis throughout the change management process. At the analysis step, we developed an organisational questionnaire around the different organisational dimensions or sub-systems, in order to support [organisational readiness to change determination](#) [A_10]. We also added advice about which [stakeholders to involve](#) [SE_00] in the analysis of each dimension. At the [planning step](#) [P_00], the above analysis serves as a basis in order to define the specific objectives and actions to undertake. We propose to structure the latter around the different organisational sub-systems.

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3.2.4 A_20 – What is your vision?

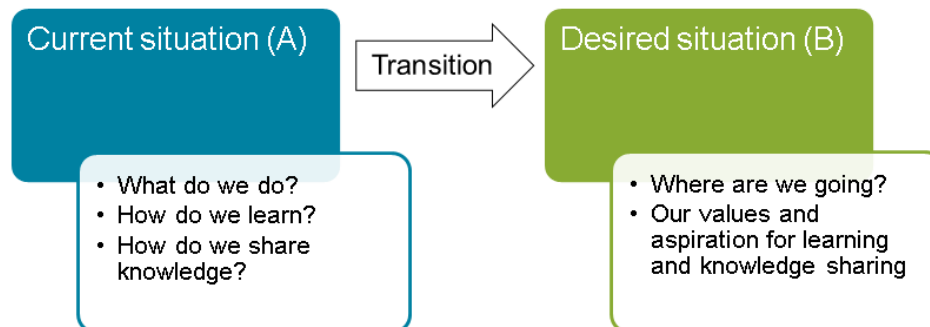
OER#	A_20	Title	What is your vision?
Incoming Link		▪ A_00	Outgoing Link ▪ A_10 ▪ A_30 ▪ SE_00

Vision is a statement of what you would like to become. So, regarding learning and knowledge sharing what is the vision of your organisation?

In order to answer this question, you will use the "[Organisational Readiness to Change Assessment](#)" [A_10] tool to determine, together with your key [stakeholders](#) [SE_00], what you would like to become compared to your current situation in terms of new learning and knowledge sharing practices.

The goal of this step is to determine what you want to achieve (your vision) compared to your current situation, and to identify the existing gaps.

- First, [analyse your initial situation](#) [A_10] regarding prerequisite to successfully implement a learning and knowledge sharing platform.
- Then, define your target situation (vision) together with your key stakeholders.




To close the gap between your “as is” and you “to be” situation, you need to achieve several objectives. [How to define your Change Objectives?](#) [A_30]

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3.2.5 A_30 – What are your Change Objectives?

OER#	30	Title	What are your Change Objectives?
Incoming Link		<ul style="list-style-type: none"> ▪ A_00 ▪ A_10 ▪ A_20 	Outgoing Link <ul style="list-style-type: none"> ▪ A_10 ▪ A_20 ▪ A_40 ▪ SE_10 ▪ P_10 ▪ C_00
<p>First, consider which stakeholders you will invite to this decision-making process, having in mind your "Stakeholder Analysis" [SE_10].</p> <p>Then, answer the following questions together, on the basis of your "Organisational Readiness to Change" tool, your "Vision" and "Barrier Analysis" grid:</p> <ol style="list-style-type: none"> 1. Level: What is the intended level of change? 2. Pace: How rapidly? <p>Through answering these questions, you will define a set of specific objectives that you wish to achieve in a given period of time, regarding your vision [A_20].</p> <p>What is the intended level of change?</p> <p>The introduction of new ways of learning and sharing knowledge in your organisation may impact different levels in your organisation. You need to identify at which level(s) (strategic, managerial and/or operational levels) change will be initiated or arise, in order to choose the adequate key stakeholders to involve in the decision-making and implementation of actions.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Strategic</p> <ul style="list-style-type: none"> •General changes which impact the organisational life in a profound way (nature of activities, main objectives...) •e.g. <i>new design of the career management model aligned with the new ways of learning and sharing knowledge</i> </div> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Managerial</p> <ul style="list-style-type: none"> •Changes in terms of staff management, work processes and procedures, control means... •e.g. <i>allow for more time flexibility for learning and knowledge sharing, introduce home-based or distant learning...</i> </div> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Operational</p> <ul style="list-style-type: none"> •Changes which affect the concrete day-to-day functioning of the organisation •e.g. <i>grant computer access, improve the quality of Internet connections...</i> </div> <p>How rapidly?</p> <p>Your analysis (in particular the "Readiness to Change Assessment" [A_10] tool) has indicated the magnitude of the existing gap between your current (A) and desired (B) situation, in other terms, it has highlighted how different is the desired situation (B) in comparison to the current one (A). To move from A to B, you can proceed through:</p> <ul style="list-style-type: none"> • Several incremental changes, each relying on what employees know and are comfortable with, not requiring them to move too far from their existing work environment and practices. Each change will have a small impact on their day- to-day work and processes. <p>OR</p>			

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- A radical change, which introduces important modifications to what employees know and are used to in their work environment and practices. This type of change will cause a disruption in their day-to-day work habits and processes.

Each solution has advantages and disadvantages:

	Incremental changes		Radical change
+	Builds on existing knowledge and resources	+	Increases the chances to complete the change
+	Better acceptance of change, less stressful	+	Profound changes in performance
-	Dilution of change through time	-	Higher resistance to change, stressful
-	Relatively small impact on performance	-	Requires new knowledge and resources, rapidly

Your choice will have implications on how the employees will react to change, and on your change management approach. Also, it is important to be aware that change is not homogenous. Its impact can be very different from one group to another or even from one individual to another.

Through answering these 2 questions, you will **define a set of specific objectives** that you wish to achieve **in a given period of time**, regarding both the introduction of the learning and knowledge sharing platform and the necessary conditions to put in place in terms of organisational context (strategic vision and goals, people management, technological conditions, buildings and infrastructure, culture and values, processes and procedures).

You can use the following template in order to set your list of objectives: Objectives Setting

Organizational dimensions	Numbering	Specific objectives: How far do you want to go?	Level: What is the intended level of change?	Face: How rapidly?			
Strategy / Mission	STRAT 1	State here your specific objectives relating to a change of strategy <i>(e.g. The new ways of learning and knowledge sharing contribute to the mission of better serving our citizens)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	STRAT 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
Processes / Procedures	PROC 1	State here your specific objectives relating to a change in the processes / procedures used in the organization <i>(e.g. Our employees have adequate time flexibility for learning and knowledge sharing)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	PROC 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
Technology	TECH 1	State here your specific objectives relating to a change in the technology used in the organization <i>(e.g. Our employees have sufficient Internet access for learning and knowledge sharing)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	TECH 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
Buildings / Infrastructure	INFRA 1	State here your specific objectives relating to a change in the buildings / infrastructure <i>(e.g. Our employees are able to upload their experience-sharing videos to the platform)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	INFRA 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
People	PEOPLE 1	State here your specific objectives relating to a change in people management practices <i>(e.g. New ways of learning and knowledge sharing are an integral part of career management)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	PEOPLE 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
Culture	CULT 1	State here your specific objectives relating to a change of organisational culture <i>(e.g. Our employees are aware of the benefits of new ways of learning and knowledge sharing)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	CULT 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
Learning & Knowledge sharing	LEARN 1	State here your specific objectives relating directly to the introduction of the learning and knowledge sharing platform <i>(e.g. Our learning and knowledge sharing platform is regularly used by 70% of our employees)</i>	<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical
	LEARN 2		<input type="checkbox"/> Strategic	<input type="checkbox"/> Managerial	<input type="checkbox"/> Operational	<input type="checkbox"/> Incremental	<input type="checkbox"/> Radical

Once your Change Objectives are defined, you can start to both define your [Action Plan](#) [P_10] and set your [change control system](#) [C_00].


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3.2.6 A_40 – Barriers to Change

OER#	A_40	Title	Barriers to Change	
Incoming Link	<ul style="list-style-type: none"> ▪ A_00 ▪ A_30 		Outgoing Link	<ul style="list-style-type: none"> ▪ A_30 ▪ SE_00
<p>As the person or team responsible of change management you need to carefully analyze potential barriers towards the implementation of new learning and knowledge sharing processes in your organisation.</p> <p>One way to do it is to organise one or several workshops with relevant stakeholders [SE_00]. You could also perform individual interviews first and then discuss them in a group meeting.</p> <p>Either way, the table below will help you pose the key questions regarding potential barriers to change in your specific organisational context. You can summarise the results in the second column. Most probably, some ideas of potential interventions will already be identified. These are useful to define your change objectives [A_30], so keep track of them in the third column of the table.</p>				
Organisational Dimensions	Barriers <i>(Barriers should be discussed. Examples can be given in case that participants need additional clarification.)</i>	Description Summary (Summary of the workshop outcomes)	/	Interventions (Summary of opportunities to overcome learning barriers)
Strategy	<ul style="list-style-type: none"> ▪ Which barriers can you see on the policy level (e.g. no policies for employee training)? ▪ Are there policies for supporting training, learning and knowledge sharing processes ▪ ... 			
Culture	<ul style="list-style-type: none"> ▪ Which barriers can be identified at the organisational level (e.g. resistance to change, lack of learning culture ...) ▪ Which barriers exist towards open education? Which barriers can occur regarding open learning and knowledge sharing? ▪ ... 			
Process	<ul style="list-style-type: none"> ▪ Can working processes be easily formalised? 			

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	<ul style="list-style-type: none"> ▪ Are there clear structures / who is responsible for processes/activities? ▪ ... 		
People	<ul style="list-style-type: none"> ▪ Do individuals have time for learning and knowledge sharing? ▪ Do individuals have knowledge and skill to use ICT for learning and knowledge sharing? ▪ ... 		
Technology	<ul style="list-style-type: none"> ▪ Are there systems for training, learning and knowledge sharing? ▪ Do we have internal technological resources to access and manage online tools. ▪ ... 		
Infrastructure	<ul style="list-style-type: none"> ▪ Can everyone access Internet or computer? ▪ Are you allowed to use mobile phones in your workplace? ▪ ... 		
Related Assets	Barriers to Change Tracking tool.pdf		

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3.3 Stakeholder Engagement

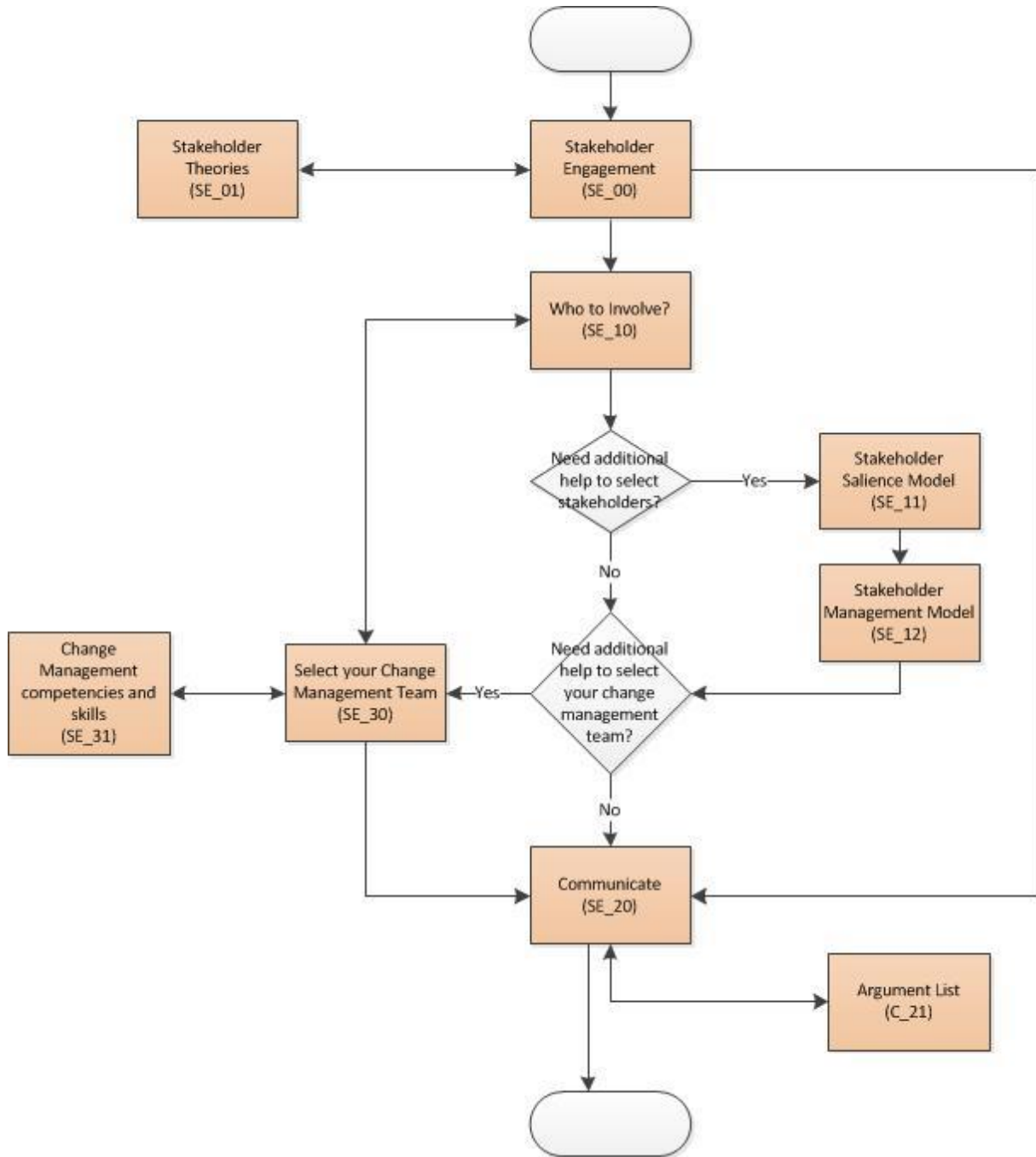



FIGURE 8: OVERVIEW OF OERs RELATED TO STAKEHOLDER ENGAGEMENT STAGE


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3.3.1 SE_00 – Stakeholder Engagement

OER#	SE_00	Title	Stakeholder Engagement
Incoming Link		<ul style="list-style-type: none"> ▪ A_00 ▪ A_11 ▪ A_20 ▪ A_40 	Outgoing Link <ul style="list-style-type: none"> ▪ SE_01 ▪ SE_10 ▪ SE_20
<p>Because it also concerns people and their relationships, Change is a social process. A well-known prerequisite for success is people – or also called stakeholder [SE_01] – engagement during different stages of the change process.</p> <p>But how to choose people or stakeholders to involve and to engage them? To answer this question, you have to be able to:</p> <ul style="list-style-type: none"> • Identify all your potential stakeholders [SE_10]; • Communicate to them throughout the change project [SE_20]. 			

3.3.2 SE_01 – Stakeholder theories

OER#	SE_01	Title	Stakeholder theories
Incoming Link		<ul style="list-style-type: none"> ▪ SE_00 	Outgoing Link <ul style="list-style-type: none"> ▪ SE_00 ▪ P_00 ▪ I_00
<p>According to the stakeholder theory developed by Freeman in 1984, organisational management needs to take into account not only the shareholders (owners) of a firm, but all the organisation's stakeholders. 'A stakeholder in an organisation is (by definition) any group or individual who can affect or is affected by the achievement of the organisation's objectives' (Freeman, 1984, p.46). The stakeholders of an organisation can be internal or external, individual or collective.</p> <p>This theory is particularly relevant for our inclusive change management strategy, as the stakeholders' involvement in the whole process will both increase the acceptance of the new learning and knowledge sharing practices (in a top-down perspective) and the adaptation of these new practices to the users' needs (in a bottom-up perspective).</p> <p>In order to support the decision-making regarding how the different identified stakeholders will participate at the different stages of the change process, we propose two complementary tools respectively based on the stakeholder salience theory of Mitchell, Agle and Wood (1997) and on the change iceberg model of Krüger (1996).</p> <p>Mitchell et al. advocate that stakeholders can be positioned along three main dimensions, power, urgency and legitimacy. Mitchell et al. draw on Etzioni (1964, p.59) to define power as the extent to which a party has or can gain access to coercive (physical means), utilitarian (material means) or normative (prestige, esteem and social) means to impose their will. Urgency is defined as 'the degree to which stakeholder claims call for immediate attention'. The 'degree' depends not just on time-sensitivity, but also on how 'critical' the relationship is with the stakeholders or the importance of their claim (Mitchell et. al, 1997, p.867). The definition of legitimacy is taken from Suchman (1995, p.574) who defines legitimacy as 'a generalised perception or assumption that the actions of an entity are</p>			

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desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions'.

Krüger (1996) provides the change iceberg model, which can be used in complementarity with the previous one, as it positions the different stakeholders according to their attitudes and behaviours toward a given project. His work also provides advice on how to manage the different categories of stakeholders on this basis, either through managing their perceptions or beliefs, or through managing power dynamics.

These theories and the related tools are presented at one of the first analysis steps of our change management process, but underlie the whole change process, as they will also serve [to determine which stakeholders](#) [SE_00] will be involved during the subsequent [planning, implementation](#) [P_00] and [feedback](#) [I_00] stages.

References

- Freeman, R.E. (1984). *Strategic Management: A stakeholder approach*. Boston: Pitman.
- Krüger, W. (1996). The change iceberg. Source: <http://www.apsc.gov.au/projects/resources/human-capital-matters/2013/change-management>
- Mitchell, R.K., Agle, B.R., & Wood, D.J. (1997). Toward a Theory of Stakeholder Identification and Salience: Defining the Principle of Who and What Really Counts, *Academy of Management Review*, 22(4), 853-886

3.3.3 SE_10 – Who to involve?

OER#	SE_10	Title	Who to involve?
Incoming Link		<ul style="list-style-type: none"> ▪ SE_00 ▪ SE_30 ▪ A_30 	Outgoing Link <ul style="list-style-type: none"> ▪ SE_01 ▪ SE_11 ▪ SE_12 ▪ SE_30

Because it also concerns people and their relationships, Change is a social process. A well-known prerequisite for success is about people engagement during change process. But how to choose the people or stakeholders to involve and to what extent (for more details see [stakeholder theories](#) [SE_01])? To answer this question, you have to be able to:

- Identify all your potential stakeholders;
- Select the crucial stakeholders to involve in the change process / in the change management team;
- If the size of your organisation is more than 10 employees, undertake a complete stakeholder analysis.

You should identify, select and involve a diverse range of actors:

- First, the change management process must be **fully supported by the 'top management'** of your organisation, as it is one of the most important success factors for any change process.
- Also, the change management process should be **driven by a [change management team](#)** [SE_30] with clearly identified actors, who will be responsible for the decision-making and the implementation of the new learning and knowledge sharing processes in your organisation.

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- Finally, you also need to involve a set of **key stakeholders who will act as facilitators** at different stages of the change process. Depending on your context, some of these stakeholders could also join your change management team.

In order to be sure to involve all important actors, first **identify all potential stakeholders** regarding the implementation of the learning and knowledge sharing platform in your organisation.

- Your stakeholders are persons or groups with an interest or concern in the implementation of new learning and knowledge sharing processes in your organisation. They can be internal or external, individual or collective actors.
- Make sure that you involve a diverse range of stakeholders in your change management efforts, taking into account seniority, gender and IT literacy levels.
- Here are some examples of stakeholders who could be potentially involved in the process: 'top management', civil servants, employees, workers, labour unions, current training providers, subject matter experts, IT support, relevant ministry, relevant policymakers, financial responsible, HR responsible, legal officer, citizens, anyone else who has interest or concern in introducing the learning and knowledge sharing platform in your organisation.

Secondly, you should select **stakeholders who are crucial** for the change management process. The most important ones should also be part of your change management team, if possible.

Be aware that the stakeholders' relative importance and positioning regarding the change may be different according to the steps of platform implementation. Therefore, you also need to decide to what extent and how different stakeholders will participate at the different stages.

If the numbers of stakeholder is important, you should maybe use additional help to identify and select your stakeholders. Please have a look to these two tools:

- [Stakeholder Saliency Model](#) [SE_11]
- [Stakeholder Management Model](#) [SE_12]

3.3.4 SE_11 – Stakeholder Saliency Model

OER#	SE_11	Title	Stakeholder Saliency Model
Incoming Link		▪ SE_10	Outgoing Link
			▪ SE_12

If there are many actors impacted by a Learning and Knowledge Sharing platform as EAGLE, you can optionally use two complementary tools to identify the key stakeholders for your specific situation and to analyze their relative importance for the change management process. This complete stakeholder analysis will lead you to select the key actors to involve at the different stages of the process.

The "**Stakeholder Saliency Model**" helps you to determine which of your stakeholders are important to involve in the change management process, according to their levels of power, legitimacy and urgency.

Position all the identified stakeholders in the following three circles: power, urgency and legitimacy.

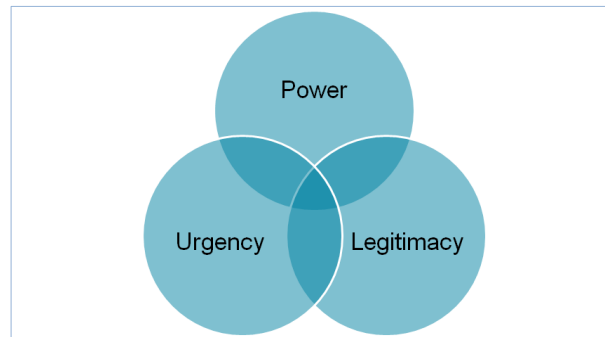
1. POWER is the degree to which a stakeholder has or can gain access to the means to impose his will.
2. LEGITIMACY is the degree to which a stakeholder is perceived as taking desirable, proper, or appropriate actions.

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3. URGENCY is the degree to which a stakeholder claims call for immediate attention, based on time constraints and/or relationship importance.

The stakeholders who are positioned at the center of the figure are those who must absolutely be "on board", and if possible in your change management team. You should involve them as much as possible in the decision-making and implementation through all change management steps (analyse, plan, act, improve as well as communication), in order to facilitate the introduction of the new ways of learning and knowledge sharing in your organisation.

Typically, the 'top management' is a crucial actor in the change management process, as it has both power, legitimacy and urgency. It is always identified as a key success factor for any change project. For example, the Rochdale Borough Council in the UK has successfully implemented an e-learning package, and states that "the key factor for the success that Rochdale has seen, was the early buy-in from senior management" (1).



You can complete your analysis by using the [Stakeholder Management Model](#) [SE_12].


For more information on the Stakeholder Salience Model, please have a look at http://university.melearning.co.uk/ekp_mel/nd/fresco/repository/EKP000057952.pdf

3.3.5 SSE_12 – Stakeholder Management Model

OER#	SE_12	Title	Stakeholder Management Model
Incoming Link	▪ SE_11	Outgoing Link	▪ SE_20 ▪ SE_30

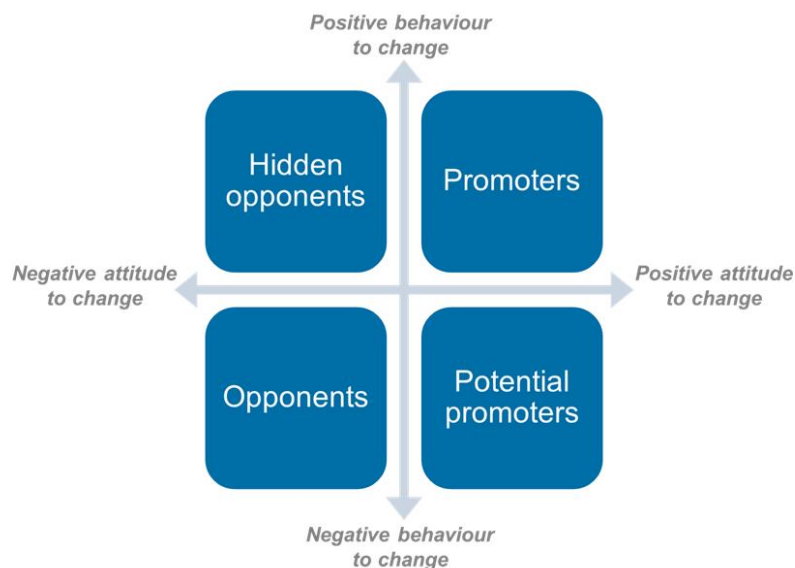
Once you have a clear idea of which stakeholders are important to involve in your change management process, you need to assess their degree of acceptance or resistance to the desired change. This tool will help you to position your key stakeholders according to their attitudes and behaviors (positive or negative) toward the introduction of the learning and knowledge sharing platform in your organisation.

1. Opponents have both a negative general attitude and a negative behavior towards change. The opponents can be useful in order to identify the existing barriers and resistance to the introduction of the learning and knowledge sharing platform, as they overtly position against it. If they are important stakeholders, you should involve them in the discussions: on the one hand, their feedback can help you improve the change process; on the other hand, you should work on their perceptions and beliefs as far as possible.
2. Promoters have both a positive general attitude and a positive behavior towards change. They take advantage of the change and will therefore support it. If they are important stakeholders, those must be involved extensively, as these actors are your key facilitators for the introduction of the learning and knowledge sharing platform. If possible, the promoters should

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be in your change management team.

3. Hidden opponents have a negative attitude towards change although they seem to be supporting the change on a behavioral level. Management of their perceptions and beliefs, supported by information about the implementation of the new learning and knowledge sharing platform, is needed to change their attitude, if they are important stakeholders.
4. Potential promoters have a positive general attitude towards change, however for certain reasons they are not convinced (yet) to change their behaviours. You should increase their level of power and/or legitimacy in the organisation, to support them becoming effective promoters of the implementation of the learning and knowledge sharing platform.



Source: Krüger (1996)

At this stage, you should be able to identify what your change stakeholders are. Some of them can also be involved in the [change management team](#) [SE_30]. To ensure their engagement, you should [communicate with them](#) [SE_20].

3.3.6 SE_20 – Communicate

OER#	SE_20	Title	Communicate
Incoming Link		<ul style="list-style-type: none"> ▪ SE_00 ▪ SE_30 	Outgoing Link <ul style="list-style-type: none"> ▪ SE_00 ▪ SE_21 ▪ SE_30 ▪ A_10 ▪ A_30 ▪ C_00

"It is impossible not to communicate!"

In other words, not communicating is already a form of communication. So, when a change such as the introduction of a new learning and knowledge sharing platform in an organisation is envisioned, you should communicate about it early on, to reduce the risk of rumors, false interpretations of what will happen and future resistance to change. The success of a communication plan can be assessed

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through:

- Acceptance of the proposed change (change in attitudes), and
- Motivation to change (change in behaviours)

You should always adjust your communication plan and activities to the context of your organisation and to the existing processes and habits (top-down or bottom-up communication, formal or informal, face-to-face or not, type of tools used...). However, it is important to be aware of the following basic principles about **who** communicates, **what** to communicate or not, **to whom**, **when** and **how**.

Who communicates?

- First, you need to formally nominate a **communication responsible** who will be in your change management team (please refer to "[how to select your change management team](#)" [SE_30]).
- Your **top management** should deliver the key messages about the strategic vision and objectives of the organisation regarding the implementation of the new learning and knowledge sharing processes.
- Ideally, the **line managers** should communicate directly to their employees about the concrete impacts of the change.

What to communicate?

To raise the employees' awareness about the need for change and to help them understand how the change will impact their concrete realities and to engage your others stakeholder, you should especially communicate on:

- The challenges that the learning and knowledge sharing platform meets in your organisation
- The risks of NOT changing anything or delaying the change
- What is going to change concretely for your employees
- Progress of change process (for more details, see [Control](#) [C_00]).

Be genuine, it is more important than being exhaustive. Focus on the key not negotiable elements, rather than on the detailed terms of change. You can use the [Argument List](#) [SE_21] to define what to communicate.

To whom to communicate?


You should not focus on a unique target, but rather talk to everyone in your organisation. That requires to:

- Identify your different stakeholders (please refer to the question about "[who to involve](#)" [SE_00])
- Know your organisational context, including the perceptions, the fears, the barriers and levers for change (please refer to the questions about your [organisational readiness to change](#) [A_10] and [barriers to change](#) [A_30])
- Adapt your communication according to the different audiences and occasions.

Take into account the various attitudes existing in your organisation. It is the receiver of the information who actually creates the message. So, use a language that is shared by your audience (not too technical, too abstract, etc.).

When to communicate?

- Develop a **progressive communication plan**, according to people's needs, which will evolve

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through the change process:

Successive needs of people	Type and content of communication
1. Awareness	Inform about the change and the change process
2. Understanding	Explain why this change is implemented, and why it is done in this way
3. Internalisation	Involve people in the change process
4. Action	Animate collaborative work, encourage people for action

- **Keep communicating!** It is extremely important to think about your communication activities in terms of a **continuous, repetitive process**, rather than a 'one shot' activity. One of your communication objectives should be to continuously promote the value of new learning and knowledge sharing processes and ensure stakeholder engagement.

It is rarely too early to communicate. Take the initiative to communicate as often as possible. And, make sure to limit potential rumors to avoid the need for resolving them.

How to communicate?

Focus 80% on communication **time** and 20% on communication tools. Indeed, not taking the time means not providing yourself with the means to communicate adequately.

- Formulate your message in a way that is clear and understandable (not too much information, not too complex or using contradicting arguments)
- Think of the tools in function of the message you want to convey and its objectives

Your behaviour is at least as important as your words. Do not use negative language or arguments that could provoke resistance (e.g. "don't be afraid" can raise fear).

3.3.7 SE_21 – Argument List

OER#	SE_21	Title	Argument List
Incoming Link	▪ SE_20	Outgoing Link	▪ SE_20

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When communicating about the need to change, you can use the following arguments from both practitioners and researchers as a starting point - but make sure to adjust them to your specific organisation. Make sure as well to manage the expectations correctly - there is a difference between making people aware of the benefits and overpromising the results.

Remember, also, that the use of a learning and knowledge sharing platform "can, but does not automatically confer benefits" (Lain & Aston, 2004). It will **only** deliver on the promised benefits if the quality of educational material is high, if the technical tool and support are sufficient, and if the change management process is effective.

Benefits of learning and knowledge sharing platforms mentioned by practitioners (1):

1. "Preparing staff for new responsibilities
2. Up-skilling staff in existing roles
3. Spreading knowledge of [X] across the organisation
4. Ensuring staff are familiar with and understand the organisation's policy, procedures and other key documents
5. Improving efficiency and customer service
6. Providing a cost-effective, flexible alternative to traditional training"


Benefits of learning and knowledge sharing platforms shown by research (2):

1. particularly relevant in sectors where there is a shortage of skilled workers
2. lower cost of delivery (time and travel costs)
3. flexibility in delivery (time and place, worldwide delivery)
4. flexibility in the pace and distribution of learning (learn at their own pace)
5. learners' convenience
6. learner's empowerment
7. better tracking (results, feedback...)
8. increased productivity and human resources' efficiency
9. making public services better, more cost effective, and more accessible
10. empowering specific groups, including citizens/professionals in rural areas


From now on you can start to build your [communication plan](#) [SE_20].

3.3.8 SE_30 – How to select your change management team?

OER#	SE_30	Title	How to select your change management team?
Incoming Link		<ul style="list-style-type: none"> ▪ SE_10 ▪ SE_12 ▪ SE_31 ▪ I_30 	Outgoing Link <ul style="list-style-type: none"> ▪ SE_10 ▪ SE_20 ▪ SE_31 ▪ A_00 ▪ A_20

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			<ul style="list-style-type: none"> ▪ A_30 ▪ A_40 ▪ P_00 ▪ C_00 ▪ I_00
<p>Change management responsible and change management team selection is based on:</p> <ul style="list-style-type: none"> • The pool of stakeholders identified in the previous step [SE_10]; • The key needed roles and activities; • The required competencies and skills; • The <i>"nice-to-have"</i> competencies and skills. <p>What do you need to know?</p> <p>Implementation of a learning and knowledge sharing platform in your organisation is a project. And as a project, some people have to manage it. You should so select and nominate your change management responsible (unless, of course, it is you who has already been charged with this role!).</p> <p>His or her (or your) activities will involve:</p> <ul style="list-style-type: none"> • Involvement of key stakeholders throughout the change management process [SE_00]; • Facilitation of the analysis of initial situation to understand the context and potential levers for change [A_00]; • Facilitation of the visioning process of the target situation [A_20]; • Identification of key barriers to change management [A_40]; • Organisation of a goal setting session [A_30]; • Co-creation of a concrete change management Action Plan [P_00]; • Supervision of the proper implementation and continuous progress monitoring of the Action Plan [C_00]; • Ongoing and final evaluation of the change management success [I_00]; <p>Additionally, you will need a change management team involving a range of roles and responsibilities. Recommended roles and responsibilities should be at least about (to get more details on Change Management competencies and skills see here [SE_31]):</p> <ul style="list-style-type: none"> • Employee learning & development in organisation. If someone in your organisation is in charge to manage learning and individual development he/she should be involved in the change management team. • Communication. Someone has to be responsible for communicating ongoing and forthcoming changes toward the different Stakeholders. • Technology. Someone has to manage technical dimensions of the learning and knowledge sharing platform, and provides technical support to the users. <p>You might need to include other stakeholders in your change management team, depending on your</p>			


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organisational context (please refer to the previous question about "[Who to involve?](#)" [SE_10]).

If your management team is ready and if you have defined both [Change Objectives and Action Plan](#) [A_00], you can [start to the learning and knowledge sharing platform implementation stage](#) [P_00]. But before starting implementation stage, you should pay attention to the [communication strategy](#) [SE_20] you will deploy throughout the change project.

3.3.9 SE_31 – Change Management Competencies and Skills

OER#	SE_31	Title	Change Management Competencies and Skills	
Incoming Link	▪ SE_30	Outgoing Link	▪ SE_30	
<p>The change management responsible should have the following required competencies and skills:</p> <ul style="list-style-type: none"> • Project management competencies; • Analytical skills; • Ability to work in teams and communication skills; • Understanding of the public administration structure and knowledge of the available resources. <p>As far as possible, it would be nice to have one or more of the following additional competencies and skills in your change management team:</p> <ul style="list-style-type: none"> • Understanding of the concepts and analytical tools of change management; • Ability to inform and explain the challenges and benefits of the proposed change; • Ability to identify the skills and competencies required by the change process; • Ability to define the respective roles and contributions; • Ability to analyse a situation using measurement tools, interviews or surveys; • Ability to identify and negotiate the allocation of resources necessary for the conduct of change; • Ability to organise, plan and monitor the various steps of the change process; • Ability to anticipate the changes and make the necessary adjustments; • Understanding of the oral and written communication techniques; • Knowledge and use of the information systems of the public administration. <p>Based on this non-exhaustive list of Change Manager Competencies and Skills, you can now start to identify members of your change management team [C_30].</p>				

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3.4 Plan and Do

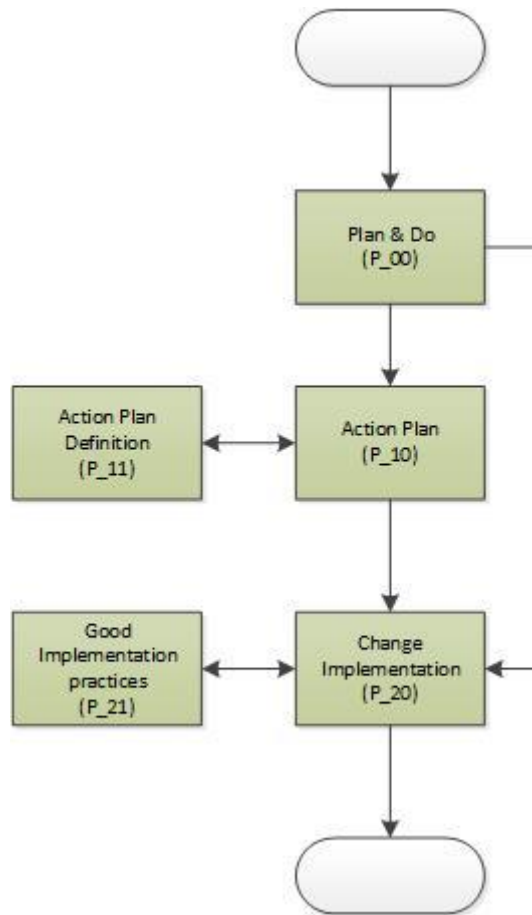


FIGURE 9: OVERVIEW OF OERs RELATED TO PLAN & DO STAGE


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3.4.1 P_00 – Plan and Do

OER#	P_00	Title	Plan and Do
Incoming Link		▪	Outgoing Link ▪ P_10 ▪ P_20
<p>The Plan and Do stage aims to plan and implement the exact scope, level and pace of the desired changes related to introducing new ways of learning and sharing knowledge in the organisation (how far do you want to go, what is the level of needed changes, how rapidly do you want to proceed). In this step you will:</p> <ul style="list-style-type: none"> • Choose the key priority actions that need to be undertaken and build a concrete Action Plan [P_10]. • Carry out defined action [P_20] and adapt them to employees' specific reactions and needs, according to the stage of change. 			

3.4.2 P_10 – Action Plan

OER#	P_10	Title	Action Plan
Incoming Link		▪ P_00 ▪ P_11 ▪ A_30	Outgoing Link ▪ P_11 ▪ P_20 ▪ SE_00 ▪ A_00
<p>With your key stakeholders (for more details see "Who to involve?" [SE_00], you will have to define what your change objectives are by identifying priority actions to undertake to fulfil your specific objectives, and defining a concrete Action Plan. In order to do so, you will:</p> <ul style="list-style-type: none"> • Organise a brainstorming session to list all potential actions; • Prioritise different action ideas ; • Choose priority actions ; • Develop an Action Plan [P_11]. <p>In order to meet the priority objectives you have defined, you must identify the key actions to undertake, and define a concrete Action Plan.</p> <p>Remember that your financial and human resources are limited, and therefore it is not possible to implement every action. You need to focus on a limited number of actions that are really important for your organisation, according to your analysis, and to translate them into an Action Plan.</p> <p>The Action Plan is at the core of your change management process, as it constitutes a reference tool to monitor change, and translates your objectives into concrete activities.</p> <p>An effective Action Plan is based on:</p>			

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- **Coherence**

The Action Plan needs to be coherent with the [context of your organisation](#) [A_00] (structure, culture, people management...). It should be the case, as your main objectives are based on the undertaken analysis, with actions that correspond to concrete employees' needs.

You should also ensure coherence between the different actions of the plan.

- **Common understanding and acceptance**

The Action Plan must be understood and accepted by all your key stakeholders.

You should make a clear presentation of the strategic vision and of the main advantages of the new learning and knowledge sharing processes for the organisation and its employees, and develop the Action Plan together with your key stakeholders.

You should involve the key stakeholders and decision makers from the beginning, and formally validate the final Action Plan with them. Remember that the adoption of the intended changes will depend largely on the degree of consensus around the Action Plan.

If you need support to define your action plan, you should have a look at the "[Action Plan Definition](#)" process [P_11].

Once your action is defined and shared with all your stakeholders, [you can start to improve how people learn and share knowledge in your organisation](#) [P_20].

3.4.3 P_11 – Action Plan Definition

OER#	P_11	Title	Action Plan Definition
Incoming Link		▪ P_10	Outgoing Link ▪ P_20 ▪ SE_00 ▪ C_00

You can define your Action Plan simply through a discussion with your key stakeholders. If, however, you prefer a more collaborative way, you can use this decision-making methodology to define it. Please consider involving **all your key stakeholders** at this stage, in order to ensure the shared understanding and acceptance of the Action Plan by the key decision-makers and actors in your organisation, who will then be able to act as facilitators and sponsors of the desired changes. If needed, give a look to [stakeholder engagement](#) [SE_00].


This methodology is based on a 4-step process.

1) Brainstorming session

You gather the participants in a meeting room and ask them to think about the **necessary actions to undertake in order to introduce successfully the learning and knowledge sharing platform in your organisation**. You can also make them prepare a list of actions before the meeting.

Each participant in turn proposes one (and only one) specific action. You note the different actions proposed on a flip chart, as they are expressed by the participants (no discussion, no judgment, no reformulation of the actions during the brainstorming session).

When everyone has proposed an action, you can repeat the exercise as many times as you want.

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The objective of the brainstorming session is to have an **extensive list of possible actions** in order to fulfil the objectives regarding the successful introduction of the learning and knowledge sharing platform in your organisation.

You can also state a maximum time limit or a maximum number of actions, in order that the participants prioritise the actions they consider most important.

2) Scoring

You prepare a **categorised list of actions** on the basis of the brainstorming session outputs, deleting / merging redundant actions and grouping the different actions in coherent categories. You send this list to each participant along with a **scoring sheet**.

Each participant individually assigns a score from 1 to 4 to each action, according to the criteria: "PRIORITY" and "FEASIBILITY".

Here is a scoring sheet example that you can use:

<p>Definition of priority actions</p> <p>Please find below a scoring sheet, listing all the actions expressed during our brainstorming session the [date].</p> <p>As agreed, please fill in this scoring sheet individually. Give each action a score from 1 to 4 both on the criteria "priority" and "feasibility" (1 = Very low, 2 = Low, 3 = Moderate, 4 = Very high)</p> <p>Some tips for your review:</p> <p>Priority</p> <ul style="list-style-type: none"> • is very high when the action should take place as soon as possible, as a prerequisite to other necessary actions, within the given timeframe • is very low when the action can be hold later or at any time during the given timeframe <p>Feasibility</p> <ul style="list-style-type: none"> • is very high when the action brings a lot and is easy to achieve • is very low when the action brings little, or is (too) difficult to achieve <p>If you do not understand the meaning of a given action, please do not rate it! In that case, do not put anything in either of the two columns.</p> <p>I remain at your disposal for any questions.</p> <p>Please send me your scoring sheet no later than [date]. Thank you in advance.</p>
<p>SCORING SHEET</p> <p>(Actions expressed at the brainstorming session on [date])</p>

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Objective	Expressed ideas	Priority	Feasibility
PROC 1	Action 01. [...]		
TECH 2	Action 02. [...]		
PEOPLE 1	Action 03. [...]		
TECH 2	Action 04. [...]		
TECH 1	Action 05. [...]		
LEARN 1	Action 06. [...]		
PEOPLE 2	Action 07. [...]		
LEARN 3	Action 08. [...]		
LEARN 2	Action 09. [...]		
LEARN 2	Action 10. [...]		
PROC 1	Action 11. [...]		
...	Etc.		

You collect the individual scoring sheets and calculate the average scores for each action. Also, keep track of the individual scorings, as they are of importance for the choice of the priority actions (see below).

3) Choice of priority actions

The choice of the priority actions is based on two dimensions: the **average score** and the **degree of consensus** around a specific action.

An action is not considered as a priority when:

- The average score for the given action is lower in comparison with the other ones.
- There are opposed scores from different stakeholders (e.g. both scores 1 and 4 present at the same time) for a given action. Indeed, these actions should not be considered as priority actions at the beginning, because there is no consensus around them, increasing the risk of losing some key stakeholders.

If you want, you can have a discussion around these actions, in order to check the good common understanding of the given action, and to possibly reformulate it, and/or change the individual scores.

If you do not reach a consensus, you must categorise the given action as not being a priority at the moment. Of course, keep track of all the actions, as they can become a priority in the future (different context, reformulation of the action...)

Additional remarks about the decision-making

You need to adapt the methodology according to the culture of your organisation and to the group size.

- You can discuss each action more or less extensively
- Different types of scoring may be used (scale on 4, 5, 7... points)

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- Different or more precise criteria could be used (priority divided in importance and urgency; feasibility divided in simplicity and available resources; or other criteria inherent to your organisation)

4) Action Plan

Finally, you need to develop an "**Action Plan**" around these actions, including information on:

- **Which actions** (description of the priority actions)
- **Why** (aim of the actions)
- **Who** is responsible (responsible actors and partnerships)
- **When** (time frame for implementing the actions)
- **How** (financial / human resources)
- **Indicators** for action monitoring (see also [Control](#) [C_00])

Is your Action Plan defined? If yes, it's time to start to [implement change](#) [P_20].

3.4.4 P_20 – Change Implementation

OER#	P_20	Title	Change Implementation
Incoming Link		<ul style="list-style-type: none"> ▪ P_00 ▪ P_10 ▪ P_11 	Outgoing Link <ul style="list-style-type: none"> ▪ P_10 ▪ P_21 ▪ C_00

You have analysed your context, defined your objectives and set an Action Plan regarding the implementation of the new learning and knowledge sharing platform in your organisation.

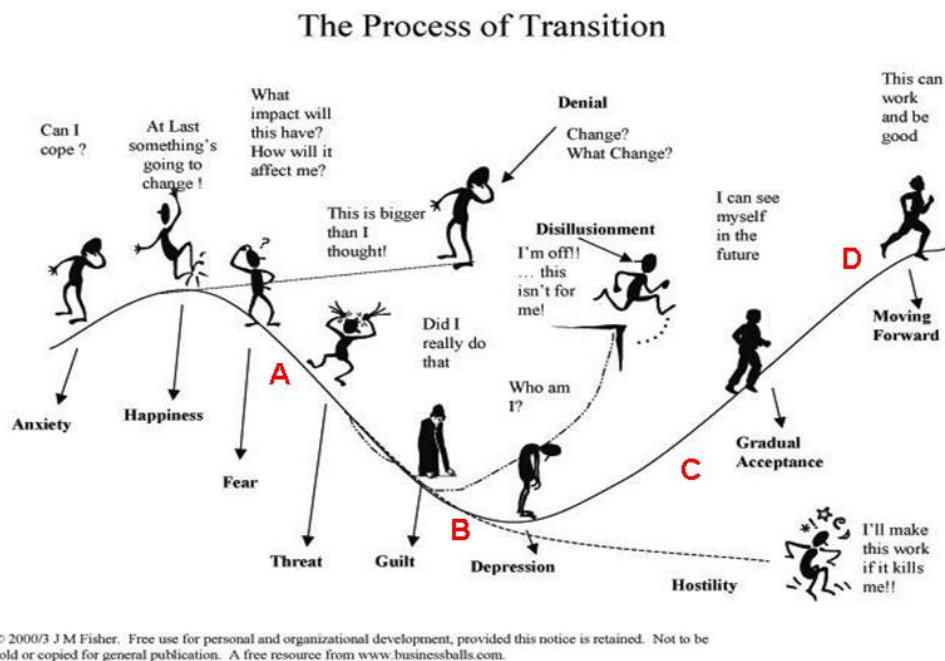
Now, it is time for action.

- You need to **follow your [Action Plan](#) [P_10] as much as possible**. But please keep in mind that reality is often different from theory, and you will certainly be confronted to discrepancies between your plan and what happens concretely in the field. It is important to **keep the Action Plan flexible** and to readjust it continuously. If you don't do it, you will end with a completely out-of-date plan that you won't be able to use.
- Also, you need to take into account that you and your involved stakeholders might have already worked on this project for a rather long time, while the rest of the staff did not. It is crucial to understand that each individual and each group needs time to accept and take over any change. You must be aware of the employees' process of transition, respect it, and give appropriate information and support at each step.
- Finally, individuals / groups are different from each other. Some people may experience the change differently, according to their personal and organisational contexts. The transition process may be longer or shorter for different people. Some steps may be longer, shorted or even skipped by some individuals / groups. You need to adapt your management style according to the individual or group experiences.


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Here is a typical representation of the **individual transition process** when a change occurs. There are four general stages that require different types of information and support from the management:

- **Loss (A)**: People's initial reaction may be shock or denial as they react to the challenge to the status quo.
- **Confrontation (B)**: Once the reality of the change starts to hit, people tend to react negatively. They may fear the impact, feel angry and actively resist or protest against the changes. They might also feel depressed.
- **New beginning (C)**: People stop focusing on what they have lost. They start to let go and accept the changes. They begin testing and exploring what the changes mean and so learn the reality of what's good and not so good and how they must adapt.
- **Action (D)**: People not only accept the changes but also start to embrace them. They rebuild their ways of working.



Here are the **do's and don'ts** that you should keep in mind as a change management responsible:

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Stage of the transition process	TO DO	TO AVOID
A) Loss	<ul style="list-style-type: none"> Clearly present the change and its impacts on people Encourage the expression of emotions (through workshops, personal contact...) Detect the individuals for whom the impact of change is the most profound 	<ul style="list-style-type: none"> Minimise the change Promise paradise Let rumours circulate
B) Confrontation	<ul style="list-style-type: none"> Mobilise people to work on concrete activities Promote discussions and exchanges Undertake coaching interventions 	<ul style="list-style-type: none"> Force people to adapt Implement other non-essential changes in parallel
C) New beginning	<ul style="list-style-type: none"> Set milestones Celebrate successes (even small ones) Accept mistakes (it means that people accept the change and try to use the new tools) 	<ul style="list-style-type: none"> Blame people if they make mistakes
D) Action	<ul style="list-style-type: none"> Make a formal assessment Consolidate the changes Encourage new behaviors and use of the new tools 	<ul style="list-style-type: none"> Remain silent about success

To inspire you in your change management efforts, you can read the list of selected "[15 Good Practices from Successful Implementations](#)" [P_21].

To ensure success of change implementation, you need [to pay attention to its progress](#) [C_00].

3.4.5 P_21 – Good Change Implementation Practices

OER#	P_21	Title	Good Change Implementation Practices	
Incoming Link		▪ P_20	Outgoing Link	▪ P_20
15 Good Practices from Successful Implementations				
<p>To inspire you in your change management efforts, below you can find some quotes from practitioners who have successfully implemented e-learning in their public administration organisations. These can provide you with valuable ideas and advice on how to manage your own change implementation process [P_20].</p>				
1 Start with the learner				
<ul style="list-style-type: none"> "Recognise the legacy the learner brings to the organisation" (1); "Where are they coming from, how motivated are they, how technologically savvy are they and how do they choose to get their information" (1); "Know your audience! Culture, climate, ages/stages, diversity" (1); "Many younger workers are familiar with e-Learning as they experienced it while in education and actively prefer this way of learning" (1); "Create a glossary of technical terms for non-technical users. Don't assume a level of IT literacy among all users."(1). 				

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2 Involve employees early on

- "On the first day of the launch over 50 Learning Pool customers signed up to be guinea pigs, thereby demonstrating the clear need for an affordable solution. Their feedback, critique and requirements shaped the first launch of the platform and has continued to inform its development ever since."(1)

3 Ensure programmes are relevant

- "Ensure programmes are relevant - this drives out resistance (...) what are the key things people need to learn on their job" (2).

4 Focus on content rather than format

- "Where does e-learning sit within your organisation today? The culture change has been gradual, but we can now present our evolving learning catalogue to staff by listing tutor-led training options and e-learning side by side with the emphasis firmly on subject rather than format" (3).

5 Nominate subject matter experts


- "The length of time that it takes to develop a new module from scratch varies depending on the topic but so far, we have found that six to eight weeks is an average length of time. The key for us has been to identify the Subject Matter Expert and the person that will ultimately sign off on the module at the start of the process. This has helped us speed up the length of time taken from storyboarding and scripting to approval" (4).

6 Offer a blended training approach

- "Different situations demand different styles of training. We strongly advocate a blended learning approach" (5).
- "We would like to offer learners a blended learning experience. We don't wish to replace face-to-face learning completely and where traditional learning is still appropriate we will endeavour to prepare learners in advance and support them afterwards with e-learning. I firmly believe that training should not be a once-off event as often the majority of what is learned is lost if it is not implemented shortly afterwards" (4).
- "Previously, Milton Keynes Council has used in-house trainers and floorwalkers but realised that an integrated approach combining online and classroom-based learning would not only be cost-effective, but also increase staff efficiency through the accessibility of online training" (6).
- "The majority of staff are using some form of eLearning alongside other training methods such as coaching, shadowing or attending occasional training courses" (7).
- "To further streamline the training process, the Borough has focused on a blended learning approach where staff are able to train away from their desks in a quiet, monitored IT area where a trainer is available to provide assistance if required. The half-day of designated e-learning time allows new staff to get up to speed as quickly as possible without the distraction of their daily workloads" (8).

7 Use a sense of humor

- "The creation of a fun element has worked exceptionally well for Tendring District Council; local government don't usually do fun!" (9).
- [Trevor = name of the e-learning platform] "Staff inquisitiveness was initially sparked off when our 12 IT reps starting wearing "Have you seen Trevor?" badges. This was further intensified with posters depicting 'Trevor' situated in various locations around the council buildings. Finally, we took our toy Trevor and photographed him on various desks once staff had left for the day. To add to the mystery, we left the photo together with a note saying Trevor was here - staff were completely perplexed" (9).

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8 Organise a launch event...

- [Trevor = name of the e-learning platform] "(...) the launch was multi-site. On the day, everyone's spirit was lifted and there was fever pitch around Tendring District Council with every Head of Service either there or represented. Trevor branding was strong, from our promotional items to our IT reps wearing t- shirts with "Ask Me about Trevor" on the back. After viewing a demonstration of Trevor, We strongly advocate the adoption of e-learning as an opportunity to bring strength to Tendering District Council's Learning and Development learners could visit a course wish list board and create their ideal shopping list from the Learning Pool catalogue. As well as building up awareness of the courses, it proved to be a very engaging approach" (9).

9 ...OR organise a 'soft launch'

- "We had a 'soft launch'. We gradually introduced the concept of e-learning prior to launching it. We referred to it in classroom workshops and generally wrapped it around events to show its relevance. For two weeks, we showcased a different module every second day. This was a short message describing a different module sent via our intranet and email newsletter to all council staff. The message also included a link to the module and invited staff to try it out. This was the best channel for getting a message out to large numbers of people quickly. We initially launched to a pilot group of 2500 learners. To avoid creating a negative first impression of the concept, we did not make e-learning compulsory, at least to begin with. Our aim was to just let staff know that it was there. We presented it as 'something new'. Our message was simply, "When was the last time you topped up your learning? Check out our new tool" (4).
- "How do you encourage Governors to use e-learning? We mainly tell Governors face to face, in training sessions and generally word of mouth" (10).

10 Create curiosity

- "It was advertised on Wave *the council's staff intranet] and it said around 100 members of staff had signed up so I was curious" (11).

11 Keep it simple

- "You cannot always make people work in the way that is required but by making it a simple process and part of standard procedure within the organisation, the approach can be accepted into the working methods and ultimately benefit the organisation and everyone working there" (12).

12 Talk to people

- "Get out and talk to people who are already doing this, they will give you advice and products; talk to more customers than providers of software - find out what the customers think" (13).

13 Don't reinvent the wheel

- "Don't reinvent the wheel - most people have already done what you are thinking of doing" (13).

14 Get a slice from everyone's budget

- "Funding can be difficult - a brilliant way to fund e-learning is to get a slice from everyone's budget, every time someone buys a pc, they pay a little extra for the e-learning programs" (13).


15 Make it optional in the beginning

- "So far there have not been any compulsory modules for staff to enable them to get to grips with the e-learning concept at their own pace. We have been impressed with the number of learners who have registered for modules but the number of completions has been lower. This hasn't been much of a concern as people are encouraged to make themselves familiar with the various modules but in the future, we may make some modules essential, such as 'Information Security' (13).

Sources:

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- (1) Ian Liggett, Bury Council, UK, <http://www.learningpool.com/wp-content/blogs.dir/1/files/2011/01/Bury-case-study-no.-2.pdf>
- (2) Jared Cameron, HR Advisor, Learning & Development, Camden Council, UK, <http://www.learningpool.com/wp-content/blogs.dir/1/files/2010/11/Camden-case-study.pdf>
- (3) IT Trainer, Julie-ann Foweraker and ICT Project Manager and Data Protection Officer, Judy Barker, Tendring District Council, UK, <http://www.learningpool.com/wp-content/blogs.dir/1/files/2010/07/CASE-STUDY-Tendring-30-July.pdf>
- (4) Case study, Milton Keynes Council, UK, http://university.melearning.co.uk/ekp_mel/nd/fresco/repository/EKP000057951.pdf
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- (6) Case study, Redbridge Council, UK, <http://www.lemosandcrane.co.uk/resources/Brighton%20and%20Hove%20City%20Council.pdf>
- (7) IT Trainer, Julie-ann Foweraker and ICT Project Manager and Data Protection Officer, Judy Barker, Tendring District Council, UK, <http://www.learningpool.com/wp-content/blogs.dir/1/files/2010/07/CASE-STUDY-Tendring-30-July.pdf>
- (8) Ann Dixon, Blackpool City Council, UK, <http://www.moderngovernor.com/wp-content/uploads/2009/08/case-study-Blackpool-complete.pdf>
- (9) Trevor Jones, Community Participation Assistant, Brighton & Hove City Council, UK, <http://www.lemosandcrane.co.uk/resources/Brighton%20and%20Hove%20City%20Council.pdf>
- (10) Case study, City of York Council, UK, http://www.sdmsltd.com/CS_CityOfYorkCouncil.htm
- (11) Chris Allan, Senior Training and Development Officer, Kirklees Council, <http://publicsectorhrpodcast.co.uk/2008/09/07/show-011-e-learning/>

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3.5 Change Control

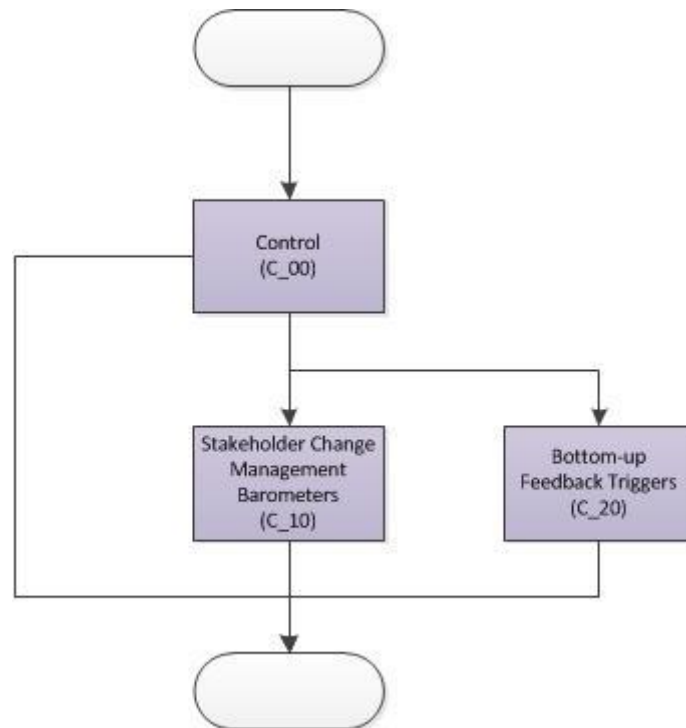


FIGURE 10: OVERVIEW OF OERs RELATED TO CONTROL STAGE

3.5.1 C_00 – Change Control


OER#	C_00	Title	Control
Incoming Link		<ul style="list-style-type: none"> ▪ SE_00 ▪ S_20 ▪ A_30 ▪ P_11 ▪ P_20 	Outgoing Link <ul style="list-style-type: none"> ▪ C_10 ▪ C_20 ▪ SE_20 ▪ A_10 ▪ P_10

The purpose of Change Control stage is to complete the project in "an integrated manner in accordance with the project plans"(1).

Control should be performed throughout the project and includes measuring performance, assessing measurement and trends that may affect implementation of learning and knowledge sharing platform. The continuous application of this process provides project stakeholders, including sponsor, change management team and other stakeholders with an accurate and current description of the change progress (for more details on communication to stakeholder see [here](#) [SE_20]).

What indicators should be used to control change progress?

- 1) You can use traditional indicators used to control a project: time, budget, and deliverable. You should regularly **check the advancement of your Action Plan** [P_10], take corrective actions and/or readjust the plan if necessary. You can reuse [Readiness to Change Assessment](#) [A_10] as a way to appreciate your progress.
- 2) But it is strongly recommended to also use indicators related to stakeholder's perception of

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change. It is important to be continuously aware of the attitudes of your stakeholders towards the implementation of new learning and knowledge sharing processes in your organisation (for more details see [Stakeholder Change Management Barometers](#) [C_10]). Therefore, make sure to stay in constant dialogue with your stakeholders during your change management efforts, notably by facilitating [bottom-up feedback](#) [C_20].

(1) ISO (2012), ISO 21500:2012 – Guidance on project management, http://www.iso.org/iso/catalogue_detail?csnumber=50003, p.16

3.5.2 C_10 – Stakeholder Change Management Barometers

OER#	C_10	Title	Stakeholder Change Management Barometers	
Incoming Link		<ul style="list-style-type: none"> ▪ C_00 ▪ I_30 	Outgoing Link	<ul style="list-style-type: none"> ▪ C_20 ▪ I_00
<p>It is important to be continuously aware of the attitudes of your stakeholders towards the implementation of the learning and knowledge sharing platform in your organisation. Therefore, make sure to stay in constant dialogue with your key stakeholders during your change management efforts (for more details, see communication [C_20]). To do so, you can use the Stakeholder Change Management Barometers.</p> <p>Stakeholder Change Management Barometers</p> <p>After each step of the change management process, ask these 5 questions to each of your key stakeholders. You can choose how you will pose these questions (survey, interviews, workshops), but a short personal interview will give you the highest quality feedback.</p> <ul style="list-style-type: none"> • How do you feel about this change? • How comfortable are you with your role? • How involved are you? • Which difficulties do you encounter? • How would you improve the change management process? <p>These feedbacks can be used to improve [I_00] your organisational capability to manage change.</p>				

3.5.3 C_20 – Bottom-up Feedback Triggers

OER#	C_20	Title	Bottom-up Feedback Triggers	
Incoming Link		<ul style="list-style-type: none"> ▪ C_00 	Outgoing Link	<ul style="list-style-type: none"> ▪ SE_13 ▪ I_00
<p>The following ideas might inspire you to take action in order to facilitate recurrent bottom-up feedback from the (potential) users of the learning and knowledge sharing platform in your organisation. Feel free to select the approaches which resonate best with your organisational culture:</p> <ul style="list-style-type: none"> • Let the person in charge of learning channel feedback for you: as suggested in the selection of your change management team [SE_13] part of this guide, nominating a Learning Concierge 				

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might be the best way for you to establish a strong connection to the (potential) users and other persons concerned by the implementation of new ways of learning and sharing knowledge. Ask the Learning Concierge to regularly elicit feedback on the 'workfloor' and hold regular (weekly or bi-weekly) meetings with her/him to collect the received comments. Questions worth asking the users:

1. What do you like about the new ways of learning and sharing knowledge? What works well for you?
 2. What would you change about it? How? What doesn't work well for you?
 3. How did the implementation process go?
Did you get all your questions answered?
Did the implementation team try to make it as easy and pleasant as possible?
 4. Are you getting the services you expected? Are they the services you need? Do you need services that you're not getting (accessibility, training, etc.)?
 5. Is implementation and change management staff supportive, helpful, and respectful? Do they seem to know what they're doing?
 6. Are you happy with the way you're treated? Are you being treated with attention and respect?
 7. Do you have sufficient opportunities to express your opinion? Are your suggestions seriously considered / taken into account by the relevant responsible persons?
 8. Are your supervisors positive towards the new learning and knowledge sharing platform? How do they help you to adapt to this change?
- Let the **walls be your ears**: consider decorating the office spaces with interactive boards that invite feedback from the workers. For instance, you might put up a question "Have you used the learning and knowledge sharing platform this month?" or "Do you like using the new platform for learning and sharing knowledge?" and provide a board for 'voting' with stickers. In this way, you will have a clear picture of peoples' practices and attitudes and a clear 'excuse' to start an open discussion about any barriers the users might be encountering. Be prepared for a possible negative feedback first, but by providing your employees with a way to express their opinions, you will be able to bring all concerns to the surface in order to manage them.
 - Elicit **random conversations**: consider letting your change management team (and yourself!) wear pins stating "Talk to me about the learning and knowledge sharing platform" to elicit random feedback.
 - Collect **e-feedback**: think of eliciting feedback through the learning and knowledge sharing platform itself, e.g. through a short survey, a voting mechanism or a forum.


These feedbacks can be used to [improve your organisational capability to manage change](#) [I_00].

3.6 Improve

3.6.1 I_00 – Improve organisational capability to change

OER#	I_00	Title	Improve organisational capability to change
Incoming Link	▪ C_20	Outgoing Link	▪ I_10

It is always interesting to look back on what has been developed and to build on this organisational experience in order to learn, reuse and share. This last step aims to evaluate the change management efforts in order to **improve** the process. In this step, you will [evaluate your change management efforts](#) [I_10] by using feedback process.

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According to Wybo et al. (2001), the feedback process consists in using a real-life event as an opportunity to collect information about the individual experiences of different actors, and to aggregate it as a collective experience. The feedback should enable to capture the perceptions about the given event, in order to better understand the past events and to allow for sharing the acquired experience when managing risk and crisis. If any risks emerge from organisational and IT changes related to the implementation of e-learning in public administration, the change management team usually has adequate time to analyse a given situation and to respond adequately.

To leverage the collected feedback and improve the change management method, several actions need to be taken: formalise the new actions to be implemented in the form of meeting minutes or a report; start implementing the improvement decisions taken and establish a way of monitoring the progress of this implementation; Distribute feedback within the administration; and distribute feedback outside of the administration (Owlwishesness et al. 2001).

According to the Kirkpatrick and Kirkpatrick's Four Levels of Learning Evaluation model (1994), different levels of feedback should be collected after training (cf. Figure below).

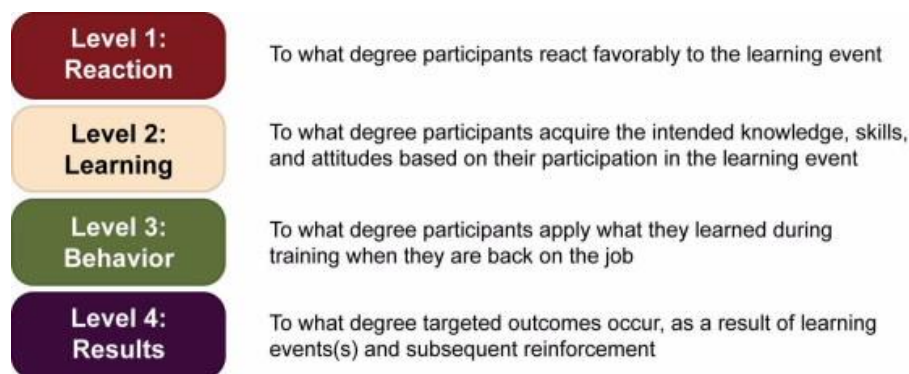


FIGURE 11: FOUR LEVELS OF LEARNING EVALUATION MODEL (KIRKPATRICK & KIRKPATRICK, 1994)

In the Local Government Change Management Guide, we focus on the first three evaluation levels in the Formal Individual User Feedback collection, whereas the Maturity Assessment exercise is an opportunity to look more into the fourth evaluation.

3.6.2 I_10 – Evaluate your change management effort

OER#	I_10	Title	Evaluate your change management effort	
Incoming Link		<ul style="list-style-type: none"> ▪ I_00 	Outgoing Link	<ul style="list-style-type: none"> ▪ I_20 ▪ I_30 ▪ I_40
<p>You will evaluate your change management efforts and identify areas for improvement. In order to do so, you will:</p> <ul style="list-style-type: none"> • Determine your feedback objective [I_20]; • Plan the feedback [I_30]; 				

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- [Choose the feedback collection methods](#) [I_40].

3.6.3 I_20 – Determine your feedback objectives

OER#	I_20	Title	Determine your feedback objectives	
Incoming Link		<ul style="list-style-type: none"> ▪ I_10 	Outgoing Link	<ul style="list-style-type: none"> ▪ I_30 ▪ A_00 ▪ SE_00 ▪ P_00

The objective of feedback collection is primarily to capitalise on the experience to improve the management of change in the future. To achieve this goal, it will be necessary to examine the way steps "[Analyse](#)" [A_00], "[Stakeholder Engagement](#)" [SE_00] and "[Plan and Do](#)" [P_00] have been carried out. For each of these stages, the change management team will usually have the following objectives:

- **Identify the positives and capitalise on them further.** This objective means identifying positive practices that have been undertaken, and which could be relevant for the management of future changes;
- **Identify the negatives and suggest areas for improvement.** This is the classic goal of a feedback process and it is also the most sensitive one. Indeed, the approach should in no way be seen as a sanction. The goal is to identify the points of failure impartially and to highlight the improvement of practices that is expected.
- **Share an overview of the different events in each phase and strengthen links between the actors.** For the management, feedback is an opportunity to acknowledge the investment of each stakeholder in the management of change and to value the work of all actors involved;
- **Enhance the experience of future change management.** For the change management team, feedback analysis will allow for an update of the methods used;
- **Leverage lessons learned to other public administrations in the region, country and Europe.** The feedback should be brought to the attention of as many peer organisations as possible to improve the knowledge and practices of public sector as a whole. Consider using the learning and knowledge sharing platform itself to share your change management experiences with peers!


Once your feedback objectives are defined, you have to [plan the feedback process](#) [I_30].

3.6.4 I_30 – Plan the feedback

OER#	I_30	Title	Plan the feedback	
Incoming Link		<ul style="list-style-type: none"> ▪ I_00 ▪ I_20 	Outgoing Link	<ul style="list-style-type: none"> ▪ C_10 ▪ SE_30 ▪ I_10 ▪ A_10

In practice, to organise the feedback, it will be necessary:

To identify the main responsible for the process within the [change management team](#) [SE_30].

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This person will be responsible for gathering the information, the collection of individual experiences, organising sharing meetings, communication of feedback to the team and to the various stakeholders, as well as the evaluation of feedback. The essential quality that this person needs to demonstrate is neutrality: the main concern is to get the most objective view possible;

To define the scope of feedback in terms of actors to be mobilised: for practical reasons, the feedback cannot cover all the people who were involved in change. The experiences of different members of the change management team are obviously very important. Nevertheless, it is also necessary to define the perimeter of the affected actors within the administration and on the outside thereof. The collection of information should be carried out with a sample of people representative of the various departments affected by the change, but also sufficiently diversified, particularly in terms of office held or experience within the administration. Ideally, all initially identified stakeholders would be involved in the feedback process;

To set a timetable. Feedback collection should be done in two modes. First, a recurring feedback elicitation should be encouraged throughout the whole change management process. Both the key stakeholders and final users should be contacted regularly to ask for their opinion about the ongoing change (see '[Stakeholder Change Management Barometer](#)' [C_10] and 'Bottom-up Feedback Triggers' tools). Second, a final formal feedback should be collected when the targeted end date of the implementation of the learning and knowledge sharing platform is reached. This involves the formal individual user feedback (see '[Formal individual User Feedback](#)' tool [I_40] and the final evaluation with key stakeholders (see "[Organisational Readiness to Change](#)" tool [A_10]).

3.6.5 I_40 – Choose the feedback collection method

OER#	I_40	Title	Choose the feedback collection method	
Incoming Link		<ul style="list-style-type: none"> ▪ I_10 ▪ I_30 ▪ I_41 ▪ I_42 	Outgoing Link	<ul style="list-style-type: none"> ▪ I_41 ▪ I_42

The choice of the method and information gathering tools depends on the place of the actor in relation to the implementation of the learning and knowledge sharing platform. For people directly affected by the change, it is better to collect their experiences through personal interviews or self-administered questionnaires. Based on the analysis and synthesis of these initial answers, the change management team may organise a sharing meeting with selected stakeholders to have a closer look on the strengths and weaknesses of the different phases and activities of the change management process.

- **Formal Individual User Feedback**

To gather the individual user feedback and depending on the availability of people to mobilise, both semi-structured interviews and self-administered questionnaires techniques are possible. Because it creates a space for dialogue for people who have been impacted by the change, we recommend, as far as possible, to use the first method.

Semi-structured interviews technique consists of two steps: (1) Creation of an interview guide for addressing the experiences of impacted people as experienced by them chronologically in relation to different actions carried out with regards to change management; (2) Individual interviews. They would usually be exploratory (unstructured) at the beginning of the interview and more focused at the

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end of the interview if the person did not address all the key topics. Allowing for a free conversation flow during the interview can help minimise the fear of control and inspection that may worry some interviewees.

An alternative technique, perhaps less rich qualitatively but more time-efficient, is to collect the individual experience through written questionnaires, which can be administered or operated anonymously.

Whatever the method used, the responsible should analyse and synthesise the information gathered in order to identify the themes that will be discussed further. This step requires a lot of neutrality, but always keeping in mind that the goal of the change management team is to capitalise on and improve the method of change.

You can use the [Feedback Interview Guide](#) [I_41] and the [Feedback Questionnaire templates](#) [I_42] to help you to collect individual's feedback.

- **Formal Collective User Feedback**

Organising a sharing meeting is the perfect moment for the exchange, dialogue and collective learning. This can be the perfect opportunity to collect and leverage feedback. The formalisation of the data collected during the collection of individual experience can serve as a driver for the collective meeting.

At the meeting, participants (change management team members and all other stakeholders for whom it would be appropriate to be part of this improvement process) may discuss the positive and negative points for each of the activities of the various phases of the change management method and reflect on the best route to improvement.


3.6.6 I_41 – Feedback Interview Guide

OER#	I_41	Title	Feedback Interview Guide
Incoming Link	▪ I_40	Outgoing Link	▪ I_40

The individual interview is one of the two [feedback collection methods](#) [I_40] you can use. It would usually be exploratory (unstructured) at the beginning of the interview and more focused at the end if the person did not address all the key topics. Allowing for a free conversation flow during the interview can help minimise the fear of control and inspection that may worry some interviewees. Below you will find an interview guide that you can adapt according to your specific needs.

- **Change management process**


- Did you have a clearly identified contact person concerning the implementation of the learning and knowledge sharing platform?
- How did your supervisors welcome the change and help you adapt to it?
- Did you feel sufficiently involved in the implementation of the learning and knowledge sharing platform?
- Did you have access to enough information regarding the implementation of the learning and knowledge sharing platform?
- Did you have a clear idea of what would change for you?
- What barriers did you encounter in the introduction of the learning and knowledge sharing platform as a new training method?

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<ul style="list-style-type: none"> ▪ Reaction <ul style="list-style-type: none"> ▪ How satisfied are you with the use of the learning and knowledge sharing platform? ▪ How much support do you receive with the use of the learning and knowledge sharing platform? ▪ What difficulties do you encounter with the use of the learning and knowledge sharing platform? ▪ How relevant is the use of the new learning and knowledge sharing processes for your job needs, performance assessment and career development? ▪ Learning <ul style="list-style-type: none"> ▪ How have your knowledge and skills evolved with the use of the learning and knowledge sharing platform? ▪ How does the new platform support knowledge sharing with your peers? ▪ Do you feel comfortable using the new platform for learning and sharing knowledge? ▪ Do you feel more in control of your own training? ▪ Behaviour <ul style="list-style-type: none"> ▪ How is the new learning and knowledge sharing processes integrated in your daily practices? ▪ How does the new platform impact the way you learn and share knowledge? ▪ How does the new platform impact the ways your peers learn and share knowledge? ▪ How do the new ways of learning and sharing knowledge change the way you and your peers work? ▪ Outlook <ul style="list-style-type: none"> ▪ Which opportunities does the learning and knowledge sharing platform provide for you and your organisation? ▪ What would facilitate better use of the learning and knowledge sharing platform in your organisation? <p>An alternative technique to individual interview is to collect the individual experiences through written questionnaires [I_42].</p>

3.6.7 I_42 – Feedback Questionnaire


OER#	I_42	Title	Feedback Questionnaire	
Incoming Link	<ul style="list-style-type: none"> ▪ I_40 ▪ I_41 	Outgoing Link	<ul style="list-style-type: none"> ▪ I_41 	
<p>An alternative technique to individual interview [I_41], perhaps less rich qualitatively but more time-efficient, is to collect the individual experiences through written questionnaires, which can be administered or operated anonymously.</p> <p>Please find attached an illustrative questionnaire that you can further adapt to your specific needs. To create an on-line version, you can use free tools such as "Survey Monkey" (https://www.surveymonkey.com) or "Google Forms" (http://www.google.com/forms/about/).</p>				

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Please give your feeling regarding the following statements using a 7-point scale. 1 means that you completely disagree with the statement, while 7 means you strongly agree with the statement. Intermediate scores allow you to nuance your answer.

<i>Disagree</i>		<i>Neutral</i>		<i>Agree</i>		
1	2	3	4	5	6	7
Completely	Moderately	Slightly	Neutral	Slightly	Moderately	Completely

Change management process						
I have a clearly identified contact person concerning the implementation of the learning and knowledge sharing platform	1	2	3	4	5	6 7
My supervisors welcomed the change and helped me to adapt to it	1	2	3	4	5	6 7
I felt sufficiently involved in the implementation of the learning and knowledge sharing platform	1	2	3	4	5	6 7
I had access to enough information regarding the implementation of the learning and knowledge sharing platform	1	2	3	4	5	6 7
I had a clear idea of what would change for me	1	2	3	4	5	6 7
I encountered barriers in the introduction of the learning and knowledge sharing platform as a new training method	1	2	3	4	5	6 7
Reaction						
I am satisfied with the use of the learning and knowledge sharing platform	1	2	3	4	5	6 7
I receive enough support with the use of the learning and knowledge sharing platform	1	2	3	4	5	6 7
I encounter difficulties with the use of the learning and knowledge sharing platform	1	2	3	4	5	6 7
The use of the learning and knowledge sharing platform is relevant regarding my job needs and career development	1	2	3	4	5	6 7
Learning						
My knowledge and skills have evolved with the use of the learning and knowledge sharing platform	1	2	3	4	5	6 7
The new platform supports knowledge sharing with my peers	1	2	3	4	5	6 7
I feel comfortable using the new platform for learning and sharing knowledge	1	2	3	4	5	6 7
I feel more in control of my own training	1	2	3	4	5	6 7
Behavior						
I use the learning and knowledge sharing platform in my daily practices	1	2	3	4	5	6 7
The new platform impacts the way I learn and share knowledge	1	2	3	4	5	6 7
The new platform impacts the ways my peers learn and share knowledge	1	2	3	4	5	6 7
The new learning and knowledge sharing platform changes the ways of working of me and my peers	1	2	3	4	5	6 7
Outlook						
The new learning and knowledge sharing processes provide new opportunities for me	1	2	3	4	5	6 7
The new learning and knowledge sharing processes provide new opportunities for my organisation	1	2	3	4	5	6 7

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4 Summary and outlook

The objective of this deliverable was twofold. Based on both lessons learnt from experimentations and remarks made by project members and partners, several modifications have been applied to the initial version of the method. First objective of this deliverable was to introduce these updates. To enhance local administration ability to change, the Local Government Change Management Method has been adapted to be easier to learn. Second objective of this deliverable was to present learning version of this methodological framework for change.

The Local Government Change Management Model Guide aims at providing support to any local organisation in managing change related to the implementation of a learning and knowledge sharing Platform. An initial version has been released and tested with Luxembourgish and Montenegrin municipalities. Based on feedbacks from both these two pilots and project members and reviewers, three modifications have been made in order to improve usability of the method. The first modification was directly inspired by remarks made by project reviewers. They expressed regret regarding the absence of a way to establish a baseline from which progress assessment of change implementation can be made. The second one is about the architecture of the method. Initially, the method was structured along a four step process (Analyse, Plan, Do, Improve). Baseline establishment and others considerations on stakeholder engagement have resulted in a new architecture of the method. Third modification is related to additional learning pathway related to bottom-up change approach. Each of this modification is detailed below.

As mentioned above, Open Educational Resources have been created by using wiki available on EAGLE Platform. A wiki is a webpage or collection of webpages designed to enable anyone who access it to contribute or modify content. Knowledge on Change Management is not exhaustive and it is likely to evolve regarding specific context. Anyone who will use these OERs are supposed to improve them continuously.


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5 Conclusion

The project EAGLE aims at introducing an open learning and knowledge sharing platform in local public administrations. One of the prerequisites for successful adoption of this platform by such organisation is to manage changes. In the context of the EAGLE project, Change Management is a critical skill. It means that local administration should learn how to change in order to always fit with evolving citizen expectations. To this end, EAGLE team has developed a methodological framework for change (MFC) – also called Local Government Change Management Method. Its purpose is to support local administration in managing organisational changes related to learning and knowledge sharing platform implementation.

The Local Government Change Management Method highlights two aspects of Change Management. First, introduce something new in an organisation supposes to adopt a structured and planned approach as proposed by Project Management approach. But, successful adoption of something new also requires to pay special attention to people who are directly or indirectly affected by change. Accordingly, the second aspect Local Government Change Management Method is highlighting is about Stakeholder Engagement.

In order to ensure Change Management knowledge transfer to local public servant, Local Government Change Management Method has been divided into 30 Open Educational Resources. Each of these OERs are at least linked to another one in order to establish personalized learning pathways.

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