

Change Manager Role

Business Change Team, Monash University

Knowledge Transfer Activity

From: **Helen Palmer** (outgoing)

To: **<to be determined>** (incoming)

February 2008

Version 1-1

Introduction

This report is prepared by the outgoing Change Manager to assist in the induction of the incoming Change Manager. The role of Change Manager was created in Oct 2006 to provide leadership and management for the change management activities to be undertaken for the XXX Project. The role was initially to establish a team and ongoing capability as well as deliver internal consultancy-style services. During 2007 the team and capability was defined and with a new Change Manager entering in Feb 2008, the role has changed to developing the team and capability as a standing ongoing team/capability that could be extended to provide services to other business-IT projects.

It is with this context that this knowledge transfer report was prepared.

The report is both a topical list of knowledge to be transferred as well as a status report of what knowledge transfer has been completed. The report does not contain substantive content of the knowledge to be gained but is a navigational device to guide the reader to sources of the knowledge.

Details of Knowledge Transfer

As at 4 February 2008

The following table contains details of the Change Manager role and the Business Change Team knowledge. The entries are not in order of importance.

	Knowledge Item/Activity	Source (Person)	Source (Artefacts) + Activity Notes	Status
1.	XXX Project – Governance <ul style="list-style-type: none"> - Steering Committee - Executive Committee - Project Sponsor - Project Manager 	Ian, Byron	V:\XXX Project\Minutes\Steering Committee Project wiki https://zxx.monash.edu.au/twiki/bin/view/XXXProject/WebHome	
2.	YYY Business Strategy	Helen	Reading material: V:\YYY\strategic_roadmap_v1.2.doc	
3.	Project Stakeholders <ul style="list-style-type: none"> - Reference Group - User Group - Training & Support Co-op - IT Management - iCCT Forum 	Helen, BCT, Simran	See Stakeholder Register and Analysis work at V:\XXX Project\Stakeholder Relationship Mgmt\Register - Stakeholder groups.xls	
4.	Reference Group Meetings <ul style="list-style-type: none"> - Purpose - Challenges, Issues - Organising engagements 	Helen, Joanne	Terms of Reference, Meeting Minutes & Agenda http://www.monash.edu/staff/XXXProject/groups/reference/index.html MAJOR PRIORITY Meeting to organise for Feb 27	
5.	Project Collaborators (internal to division) <ul style="list-style-type: none"> - Client Communications - Service Management Office - Project Management Office - Usability & Accessibility Services 	Helen, BCT		
6.	XXX Project <ul style="list-style-type: none"> - Position statements/decisions reached - Current issues and risks - Your contribution/resp 	Ian, Daryl	\\YYY\Program Management\Briefing Papers\ \\XXX Project\Issue and Risk Log.xls	

	Knowledge Item/Activity	Source (Person)	Source (Artefacts) + Activity Notes	Status
7.	<p>XXX Project Change Program</p> <ul style="list-style-type: none"> - Overlap with other change programs - Management and reporting requirements - Scope of work 	Helen	<p>See 2007 Project Reports V:\XXX Project\Change Program\Planning & Reporting\Archive\ See Work Plan V:\XXX Project\Change Program\Planning & Reporting\Plan - XXX Change Program - Nov 2007 v1.4.doc</p>	
8.	<p>ITS Organisational Structure</p> <ul style="list-style-type: none"> - Where IMSP fits in; where BCT fits in - Key relationships - ITS Directorate - ITS Mgrs Forum - IT Managers Forum 	Ian	http://www.its.monash.edu/aboutits/orgchart.html	
9.	University Organisational Structure	Ian	See also http://mids.monash.edu.au/	
10.	<p>Business Change Team (BCT)</p> <ul style="list-style-type: none"> - History - Structure; people and service; - Team mgmt tools and techniques - Current operational issues 	Helen, BCT	<p>Drawing on whiteboard Concept of Lead BA (Helen's handwritten notes) \\XXX Project\Change Program\Planning & Reporting\BCT Work Schedule 2008 Master CURRENT.mpp</p> <p>Weekly Team meeting with rotating chair Weekly ½ hour 1-1 meetings with direct reports Monthly Planning meeting lead by Change Mgr Monthly Project reporting</p> <p>Reading material \\YYY\Business Change Management\Team Administration\Work Management</p> <p>Team Email (audience for email address = internal project collaborators; m'ship = BT members) bus-change-l@its.monash.edu.au</p>	
11.	BCT Team mgmt tools and techniques	Helen, BCT	<p>Knowledge Splats Work Packages Time budgeting technique BSD Report Knowledge worker paradigm</p>	
12.	<p>Business Change Team</p> <ul style="list-style-type: none"> - Vision; next steps for development 	Helen	\\YYY\Business Change Management\Services Material\BCM Service Development\Profile - Change Team Nov 2007.doc	
13.	<p>BCT Human Resources</p> <ul style="list-style-type: none"> - Team Status - Individual development thoughts - Team development thoughts - Team protocols - Staff Development's consultancy - New resources to be recruited 	Helen	<p>Reading material: HR Status Report – to be written Individual staff files in filing cabinet including Performance Mgmt Plans; HR Division hold primary staff records</p> <p>Role Specifications in development, See \\YYY\Business Change Management\Team Administration\Human Resources\ and \\YYY\Dept Administration\Human Resources\ Assoc BA PD awaiting classification</p>	
14.	<p>Internal Consulting Skill Development Strategy</p> <ul style="list-style-type: none"> - What's happened - What next 	Helen	<p>Collaboration with Emily and Claire Strategy: \\YYY\Business Change Management\Team Administration\Human Resources\Memo - Strategy for consultancy skill development Oct 07.doc</p>	

	Knowledge Item/Activity	Source (Person)	Source (Artefacts) + Activity Notes	Status
15.	Human Resources Processes and Tools <ul style="list-style-type: none"> - ESS tool; approver workflow - Performance Mgmt Scheme - Staff Development - Contacts 	Melissa/ Anita, Ian		
16.	Monash University Manager stuff – Development/Training <ul style="list-style-type: none"> - OHSE for Managers - Performance Mgmt for Supervisors - Staff Selection for Monash recruitment - ITIL for ITS Managers 	Melissa/ Anita, Ian	http://www.adm.monash.edu.au/staff-development/general/	
17.	Financial Process and Tools <ul style="list-style-type: none"> - Contacts - Information 	Ian, Max, Judy		
18.	BCT 2008 Budget	Helen, Ian	\\XXX Project\Change Program\Planning & Reporting\ NB: This folder is soon to be renamed!	
19.	BCT Cost Recovery Model	Byron, Ian, Helen	To be developed with guidance from Byron and Ian BCT members keeping record of hours spent per project so charging can be done \\YYY\Business Change Management\Team Administration\Work Management*	
20.	Project Management Process and Tools <ul style="list-style-type: none"> - Contacts - Resources - Project Reporting responsibilities 	Ian, Dennis	http://www.its.monash.edu.au/staff/projects/project-management/ http://www.its.monash.edu.au/staff/projects/	
21.	Information Management/Knowledge Mgmt <ul style="list-style-type: none"> - XXX Project - XXX Change Program - Business Change Team 	Simran	See Email to team 2/02/08 about restructuring of folder Knowledge Splat template Knowledge Transfer template Work Package Template	
22.	BCT Project Management	Helen	\\YYY\Business Change Management\Services Material\Project Management & Administration\	
23.	Role of BCT on projects <ul style="list-style-type: none"> - Model of collaboration - Past, future - Services delivered 	Helen, Ian		
24.	Business Change Management (BCM) Services: <ul style="list-style-type: none"> - vision, conceptualisation - development - challenges, issues - Educating colleagues 	Helen, BCT,	\\YYY\Business Change Management\Services Material\BCM Service Development\ ITIL Release Management, R Harrington ITIL Change Management, N Hindson	
25.	<ul style="list-style-type: none"> - Change Management & Stakeholder Engagement 	Helen, Joanne	Reading material: \\XXX Project\Change Program\Planning & Reporting\Overview - XXX Change Program v1.0.doc \\YYY\Business Change Management\Services Material\General\Notes - Developing your Chg Mgmt Strategy - Nov 07 v0.4 DRAFT.doc	
26.	<ul style="list-style-type: none"> - Business & User Rollout; BCM 4 step Rollout process 	Helen		
27.	<ul style="list-style-type: none"> - User learning, documentation and support <ul style="list-style-type: none"> o ITS Service Desk o Staff Development 	Julie, Hong, Joanne	ITS Service Desk; A Pirera, S Awad Staff Development	

	Knowledge Item/Activity	Source (Person)	Source (Artefacts) + Activity Notes	Status
28.	<ul style="list-style-type: none"> - Communications & Promotions <ul style="list-style-type: none"> o Branding, themes o Concepts o Planned Activities & Ideas o Collaboration with Client Comms 	Joanne, Simran	Mondo the animation concept!	
29.	<ul style="list-style-type: none"> - Business Solution Development 	Desiree	Helen's BSD paper (see Desiree); BSD Report template	
30.	Role and scope of influence of Change Manager; some thoughts <ul style="list-style-type: none"> - compared to Lead BA - compared to Project Manager 	Helen, Cam, Desiree		
31.	WCR Project development and implementation; history + future thoughts; planning 2008 work Software projects: <ul style="list-style-type: none"> - Lotus Notes - Lotus Sametime - Lotus Quickplace 	Helen, Daryl, Desiree	MAJOR PRIORITY See Desires' Briefing paper and notes. Submitted to XXX Steering Committee on 14 Feb 08	
32.	Lotus Notes Accessibility & Usability Issue <ul style="list-style-type: none"> - Intervention required? - Invoice/charge to come - Perceived value of work done 	Helen, Desiree	Key stakeholder to engage/manage: Kay Gardner, Equity and Diversity See Desiree for copy of report See Issues in XXX Project Issue & Risk Register RECOMMENDED NEXT STEP: Prepare report on all accessibility issues to be tabled to Executive Committee	
33.	X, Y, Z of IT Services <ul style="list-style-type: none"> - Objectives - Budgetary influences 	Byron, Michael B		
34.	ITS Services <ul style="list-style-type: none"> - Services Catalogue - Service Office & Service Managers - SLA & Service Statements 	Michael B, Ian		
35.	Staff Attitude Survey <ul style="list-style-type: none"> - Results as source for change program - ITS Response - Your responsibility 	Helen, Byron	See hard copy documents provided by Helen	
36.	eResearch at Monash & relationship to XXX	Neil Clarke, Desiree	eResearch group a potential collaboration partner to develop a 'Place' in Lotus Quickr as POC of the tool applied in research context; impt strategic alignment	
37.	Griffith Site Visit March 07; lessons learnt for Lotus Notes implementation <ul style="list-style-type: none"> - Context - Recommendations 	Helen	\\XXX Project\Change Program_Reference Material\Notes - Griffith University Site Visit March 07 - SK and HP.doc	
38.	"Transition difficulties" to be addressed by Change Program <ul style="list-style-type: none"> - Contacts - Thoughts - Issues, Challenges 	Helen	See page for 'mental health' stress-free zone idea at http://www.monash.edu.au/staff/collaboration/communicate/resources/stress-free.html	
39.	Change Program Ideas <ul style="list-style-type: none"> - Unused - Future value? 	Helen	See handwritten notes in folder from Helen	
40.	HR Division's Change Management Framework <ul style="list-style-type: none"> - who, what, when - Meet n greet with Bronwyn Johnston 	Helen	See Mary Anne Gallagher to arrange meeting with Bronwyn	