



SECOND ITEM ON THE AGENDA

Training for the Integrated Resource Information System (IRIS)

Introduction

1. This paper provides an update on the current status and progress of the IRIS training strategy which was placed under the responsibility of the Human Resources Development Department (HRD) in January 2007. The paper presents an overview of the approach to IRIS training; outlines the achievements to date; and indicates planned activities for 2008–09. The paper addresses recommendations made during previous ICT Subcommittee meetings.
2. The overall objective of the IRIS training strategy is to leverage the benefits of IRIS through greater knowledge of the system's capabilities, and to facilitate a transfer of knowledge towards in-house expertise. The IRIS training strategy is firmly rooted in the human resources strategy through its contribution to promoting staff learning and development and improving the efficiency and effectiveness of the Office to deliver its mandate. The IRIS training strategy furthermore plays an important role in supporting results-based management through its promotion of the tools and techniques needed to record and monitor progress on targeted objectives.

General approach and lessons learned

3. The IRIS training strategy has consistently been defined around user roles and responsibilities. The first round of training courses organized around go-live in 2005–06 represented an enormous effort and achievement, and enabled headquarters to transition to the IRIS system without any major interruption. Courses and workshops were offered to over 800 users in: introduction to IRIS, procurement, external collaborator contract processing, travel requests and travel claims, technical cooperation projects management, budget management (RB and TC), external payment authorizations, Oracle Discoverer reporting, accounts payable/invoicing, and human resource personnel action processing.
4. Improvements to the training strategy have since been made to reflect system changes and experience gained. The initial emphasis on learning in a formal classroom setting, with hands-on practice sessions, has been improved to include a more blended learning approach offering a broader range of learning options and using new techniques for

providing timely, on-the-job learning. Other changes have been made based on lessons learned from participant feedback following the initial go-live training sessions in 2005–06.

5. One of the key lessons learned referred to the course design. Conceptually, the earlier training courses were based on defining individual roles within a specific module. While effective as an initial training approach, participants felt that this modular role-to-course mapping should be redefined to better reflect workplace realities around end-to-end processes. In addition, participants sought more information on the rules and regulations governing the transactions. There was a need to build a more integrated and cohesive curriculum across IRIS functionalities, in line with actual rules and regulations, and which reflected the full range of end-to-end processes.
6. Another suggested area of improvement led to the reorganization of courses around a more sequential, progressive learning approach, i.e. from minimum skills to basic, advanced and expert level courses. In addition, a curriculum structure was needed to guide participants as to which courses to take and in which sequence. Similarly, in order to optimize managerial capacity to make full use of the IRIS system as a management information tool, a separate course sequence was needed, based solely on the manager's role in using IRIS.
7. Participants furthermore suggested that a broader range of training tools would be beneficial. Post-training reference materials were needed as a complement to the materials used to deliver training. Training materials were revised to include more interactive learning features and to facilitate the “repackaging” of courses into various combinations. In addition, structured course outlines and comprehensive guides improved the consistency of course content across different trainers.
8. The in-house trainers and subject-matter experts that delivered classroom courses and workshops were very much appreciated. It was found that it was better to have internal staff assisting in training delivery since external trainers did not always understand the user environment and ILO policies and procedures. Furthermore, the development of internal staff to facilitate training sessions has helped secure the transfer of knowledge in-house and has promoted knowledge sharing among staff members.

Revised training methodology

9. The lessons learned from the training sessions in 2005–06 have been incorporated into the current training approach. The curriculum structure, training courses and materials were redesigned in an integrated fashion to better reflect how ILO staff use IRIS to do their jobs, rather than according to the structure of individual IRIS modules. Courses now have supporting training and reference materials which make for a versatile training programme. The new format helps better meet the training needs of those seeking entirely new skills and can also be easily “repackaged” into materials for procedural documents, quick reference cards, topical workshops, FAQ responses for financial control officers, help-desk, self-directed learning modules, online reference materials and help files.
10. The list of courses has been defined according to tasks to be performed and then structured into learning tracks which show the learning path users must follow to meet their learning requirements. The learning tracks are structured from basic to expert levels with prerequisite courses to establish a progressive approach to learning and to ensure common levels of understanding among course participants. Currently, there are six integrated training tracks that allow users to understand course sequences and interrelationships across different functionalities. One track specifically addresses management needs. The tracks cover both the learning requirements for department level end-users as well as for

the centralized, specialized support units. Designing and developing training for centralized support unit functions is considered to be a very important element as it addresses the learning requirements of current staff and prepares for the possibility of decentralizing certain functions to the field with the roll-out.

11. A blended approach to training has been adopted which provides a variety of methods and tools for learning that meet the diverse learning styles and time constraints of staff members. Learning options include classroom training, self-directed study, coaching, workshops and several online, interactive tutorials as overviews/introductions to certain learning tracks. In addition, the training and reference materials are integrated with business procedures and processes. The training also includes exercises to provide the trainees with the opportunity to process their day-to-day tasks in IRIS based on real-life scenarios and data.
12. Tools required to develop, administer and manage training are also part of the strategy. Efforts are under way to investigate the possibility of linking up resources with other UN organizations that are also currently planning on implementing learning management systems. In addition, it is foreseen that an existing database tool that maps roles/responsibilities to persons can be modified to link roles/responsibilities to the curriculum. This would facilitate training needs assessment related to future upgrades and releases. As functionalities change, it will be easier to identify the best learning option to address this change, the materials that need updating and the target audiences impacted based on the role/responsibility mappings.
13. It is important to note that the training materials have been designed in a manner that is consistent across the Office: headquarters and field offices will use the same materials. This coordination of the training materials and curriculum is in line with the objective of delivering a fully integrated system and will facilitate training and communication across the Office.
14. In order to review and coordinate the training strategy, an IRIS training advisory group has been established. The group is comprised of representatives from the functional and organizational units, and development and change management teams. The group ensures coherence between the broader training strategy of the Office and future system upgrades.

Training of trainers

15. HRD has overseen the selection and training of a headquarters pool of IRIS trainers. As a growing network, the pool represents approximately 15–20 multilingual, IRIS super-users with knowledge across the full range of modules. This is to ensure knowledge of the day-to-day working environment and to secure an autonomous in-house knowledge base.
16. In July 2007, an initial group of four IRIS trainers were selected to participate in the Jakarta go-live training sessions. This not only provided the Jakarta course participants with subject-matter expertise within the classroom but also allowed for the IRIS trainers to test and improve the revised training materials. The opportunity not only reinforced the trainers' existing knowledge of the system and provided a field office view of the system, it also offered an important recognition element for motivated headquarters staff who had mastered the skills required for using IRIS.
17. In a similar light, HRD has provided support for consultations with the regions so that headquarters functional specialists could present and demonstrate the IRIS system to field participants. HRD also provided support to key field staff from all the regions to become familiar with the IRIS system at headquarters. At the same time, field staff assisted the

IRIS functional team to review business processes and assess the impact of the system in preparation for the field office roll-out. It is anticipated that many of these field staff members will act as change agents and serve as focal points for training and support to the IRIS-user community in their regions and offices.

18. In October 2007, the headquarters pool of trainers underwent a course on training methodology, coaching and communication skills. In addition, it is foreseen that the trainers will receive ongoing briefings on new IRIS functionalities, change management issues and strategy updates.

Approach to training at headquarters

19. Training based on the revised curriculum strategy began in March 2007 with the delivery of the introductory, prerequisite courses. A self-paced learning module for personnel actions was released in July 2007. A newly prepared training activity on available reports was launched in October 2007 as a means of establishing productivity gains where benefits had not yet been fully realized.
20. Following the Jakarta testing of materials, a headquarters training programme is planned for October and November 2007. The objective is to provide refresher training for existing users to optimize performance and to expand the base of knowledgeable IRIS users and to prepare the ground for upcoming new releases. Courses are scheduled based on the number of requesting participants, prerequisite requirements and the training track sequencing, as well as on the availability of the trainers.
21. It is assumed that most actual and newly appointed IRIS users will have completed their IRIS training tracks by the end of 2007.

Approach to training in the field

22. In the context of IRIS training for the field, there are two major considerations – how training will be delivered and who will deliver the training.
23. In terms of delivery, it has been agreed, following consultation with the regions, that the best mechanism for delivering IRIS training is through a classroom-based approach. The training should include ILO procedures and policies in addition to the specifics of using IRIS as a system. The training should also include exercises to provide the trainees with the opportunity to process their day-to-day tasks in IRIS based on real-life scenarios and data. All of these requirements are part of the headquarters IRIS training and the IRIS training strategy calls for a unified approach to training for both headquarters and the regions, wherever possible.
24. Initial training must be provided at IRIS go-live, but it is also necessary to provide continuous training for new staff members, for staff members who change responsibilities and refresher training for all staff members. With this in mind, the approach for providing training in the field is to establish a training capacity within each region.
25. Staff members from each region have been identified to fulfil the role of trainers. In order to build their expertise, these staff members are actively participating in ongoing IRIS tasks from their respective offices, supplemented by missions to work with the IRIS team at headquarters. The field trainers are also acting as change agents within their regions to coordinate the local change management effort related to the roll-out of IRIS. This is essential to creating awareness and setting appropriate expectations among the future IRIS-

user community significantly in advance of the implementation of additional IRIS functionality.

26. Similar to the approach in headquarters, prior to the deployment of IRIS, the field trainers will receive training focused on delivery. This will cover business processes and procedures, rules and regulations, IRIS functionality and training delivery techniques.
27. Owing to the extent of information and expertise required to provide IRIS training, it is expected that external training support would need to be provided for the initial training sessions within a region. Training support would be provided from headquarters but could, in the longer term, be provided from other regions that have implemented corresponding IRIS functionalities.

Training instances

28. Altogether, over 600 participant training-seat instances have been offered during 2007. The participants included both field and headquarters staff. Courses included high-level or introductory-level courses in an auditorium setting, hands-on classroom-based courses, workshop and refresher sessions, as well as stand-alone, self-study courses.

Budget

29. During 2006–07, resources for IRIS training have been funded centrally through HRD's Office-wide training fund. The IRIS training strategy is essential for attaining full mastery of the IRIS processes, and is a key element for ensuring that staff are adequately supported in their efforts to meet the Office's objectives.
30. To this effect, the projected expenditure for the end of the 2006–07 biennium is approximately US\$950,000. Within this amount, approximately 37 per cent was spent on preparing field office staff, 34 per cent on training headquarters staff and 29 per cent on developing Office-wide training materials.

Future developments

31. The IRIS training strategy will evolve in collaboration with deployment tasks, change management needs and roll-out initiatives as set out in the Information Technology Strategy. As the roll-out to the field progresses, it will be essential to work closely with the regional IRIS training teams. The IRIS training strategy will continue to evolve not only in relation to the field roll-out, but also in relation to ongoing changes in organizational structure, work roles, policies, new technologies, system upgrades and user needs.
32. A key risk management concern is to secure dedicated staff member support for IRIS training in headquarters and the field and to coordinate an integrated training programme across the Office given the anticipated high demand for IRIS training. For the biennium 2008–09, it is expected that the IRIS training strategy and budget will be defined following the determination of the overall IRIS plan and the staff development training strategy and budget for the Office.

Geneva, 4 October 2007.

Submitted for information.