



**MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT**  
HIKINA WHAKATUTUKI



# **Vision 2015 Training Approach**

Version: 1.1

Date: 1 July 2015



# 1. Document control

---

## Document History

Date	Version	Author	Description of change
24/06/15	0.1	Sohan Akolkar	Initial draft
30/06/15	1.0	Paul Lawrence	Amendments made / finalised for business review
01/07/15	1.1	Paul Lawrence	Reviews from Meegan Sorenson incorporated
	1.2		

## Document Sign-off

The following signatures indicate approval and acceptance of this document, subject to any caveats below:

Name	Role	Date

**Caveats:**

------------------



# Contents

---

<b>1. Document control .....</b>	<b>2</b>
<b>1. Document purpose .....</b>	<b>4</b>
Background .....	4
<b>2. Phases in learning development .....</b>	<b>6</b>
Phase 1: Training needs analysis.....	6
Phase 2: High level design.....	7
Phase 3: Development.....	7
Phase 4: Implementation.....	10
Phase 5: Evaluation.....	11
<b>3. Design and development principles .....</b>	<b>13</b>
Over-arching principles.....	13
Additional principles .....	13
<b>4. Roles and responsibilities.....</b>	<b>14</b>



# 1. Document purpose

---

The purpose of this document<sup>1</sup> is to detail the training approach for Immigration New Zealand's Vision 2015 Programme.

The training approach has been developed based on the IGMS Training Strategy developed in 2012 and based on lessons learnt from the Vision 2015 programme so far. The approach:

- informs the analysis, design, development, testing and delivery of learning materials being developed to support the programme
- lists principles that influence the design and development of programme learning products
- acts as a guide for learning development professionals (internal and external) to calibrate their approach towards developing learning for any large-scale or complex projects or INZ's business as usual release cycles.

## Background

Immigration is a significant contributor to New Zealand's sustainable economic growth and plays an important part in export industries vital to the economy, such as tourism and education. There are several challenges to delivering an effective and efficient service:

- the current immigration system and service delivery model are neither financially sustainable nor fit for purpose in the long term;
- employers and other customers cannot rely on receiving a consistent quality of service;
- our identity management and biometric capabilities are not adequate to support our local obligations as the authoritative source on non-NZ identity information, nor are they adequate for increasing international demands;
- as a research tool for prospective immigrants, the INZ website is not sufficiently useful and intuitive to maximise the benefits to be gained from getting the right information to the right potential applicants with the minimum of effort;
- it can be difficult for applicants to get quality information about the status of their applications and when they can expect a decision; and
- government agencies that need to verify a person's entitlement to receive public services cannot access the information they need without help from INZ staff.

Informed by the findings from the Immigration Business Transformation project (which concluded in 2010), Cabinet directed INZ to undertake a procurement process and develop a business case for the establishment of a foundation immigration system, that would enable and support INZ's business change. The IGMS Business Case was approved by the Cabinet Business Committee (CBC) in October 2011.

---

<sup>1</sup> This document is an upgrade to the existing *IGMS Training Strategy* document produced in 2012.



The **Vision 2015 Programme** was established in October 2013 when the Vision 2015 Business Case was approved. The purpose of the programme is to bring together & deliver business change initiatives and benefits enablers within INZ, with a key objective to realise the benefits articulated in the IGMS Business Case. Vision 2015 outcomes include:

- rationalise representation and/or reduce headcount in some regions by centralising processing, where practical, which will be facilitated by the availability of online information, services and identity management and supported by organisational changes;
- reduce the volume of enquiries handled through traditional channels, by developing and deploying Immigration ONLINE, incorporating assisted and self-service models;
- expedite services for low risk applicants and reduce the incidence of foreign nationals entering New Zealand under false identities, by increasing the certainty of applicants' identity;
- improve customer service and passenger flows by reducing recourse to needless or unjustified intervention, due to incorrect or incomplete information;
- deliver improved customer choice and flexibility, including access to 'premium' services, such as faster processing of low risk applications;
- rationalise the number of visa types and simplifying application processes;
- improve customer experience, by streamlining processes, improving throughput, increasing transparency and accountability, and reducing the incidence of iterative referrals;
- free-up officers' time that they can commit to more challenging cases that require more investigation and judgement, by automating high volume, low risk, repetitive work wherever practicable;
- enable smarter identification and more timely and effective intervention during the visa process and at the border, by sharing identity, biometric information and intelligence appropriately within INZ and across agencies;
- use shared information and intelligence to reduce immigration fraud and related malpractices by applicants, advisors and other parties;
- reduce downstream costs in health, education, justice and welfare spending in NZ through more accurate and discerning assessments before and at the point of entry.

Development of the learning materials to support the Vision 2015 Programme has been undertaken by an external training development vendor, Kineo in conjunction with INZ and MBIE's Technical Training Team. The principles and methodologies identified in this document align with best practice training development and the wider MBIE's Training Strategy.

## 2. Phases in learning development

---

As an over-arching principle, the training approach requires that all training material be strongly orientated towards achieving learning outcomes. Learning outcomes must be framed as demonstrable learner behaviours that can be observed upon completion of learning activities. The phases described in this section discuss how to identify and meet learning outcomes.

Learning development must broadly follow the ADDIE model<sup>2</sup>, which consists of the following phases:



### Phase 1: Training needs analysis



Training needs analysis is a crucial first step in the development of learning materials.

The objective of the training needs analysis phase is to identify the learning requirements of different audience groups based on:

- the business process improvements and technological upgrades being introduced as part of the Vision 2015 programme
- the organisational outcomes of these improvements and upgrades
- the short- and long-term impacts of these changes on learners (staff) and their work
- learners' existing level of competence.

### Output(s)

This phase typically results in a Learning Specifications Document being produced. A sample Learning Specifications Document for Vision 2015's BSD2, June 2015 Rollout can be found in the following location [insert MAKO link] or is available on request from [insert business owner TT team or SDP].

---

<sup>2</sup> The ADDIE model is presented here as a guideline. In practice, each project must be approached individually depending on project timescales and complexity. Learning development phases may sometimes need to produce different outputs to those described here; such as an online module being produced directly after a Learning Specifications Document that specifies learning outcomes. The number and type of artefacts created is secondary to ensuring that thorough analysis is carried out, learning outcomes are accurately identified and materials are developed accordingly.

## Phase 2: High level design



The high level design phase applies the analysis from the previous phase to identify a suitable instructional approach and learning outcomes.

This phase is carried out with a view to:

- develop training content focused on what staff members in each audience group need to do differently in order to perform their jobs
- equip staff to respond to situations they may commonly encounter, and therefore cover the most frequent and critical tasks from standard scenarios
- cater to specific requirements of specialist groups, such as profiling, intelligence and teams that support front-line users.

To that end, the design phase must account for training requirements in three main areas:

1. contextual training requirements, explaining the reasons for and advantages of upgrades being introduced
2. business training requirements, including high-level processes and procedures
3. systems training requirements, including simulations of software systems wherever possible.

The objective of the high level design phase is to specify:

- learning outcomes for different audience groups
- an instructional strategy for meeting these learning outcomes through the development of learning materials
- content coverage across blended learning materials and a tentative sequence of learning topics and activities
- a decision on what types of learning media work best to meet certain learning outcomes; for instance, since the Immigration Contact Centre needs information to be readily accessible on-the-job, a printable one-page job aid might be suitable.

### Output(s)

This phase typically results in a High Level Design Document being produced. A sample High Level Design Document for Vision 2015's BSD2, June 2015 Rollout can be found in the following location [insert MAKO link] or is available on request from [insert business owner TT team or SDP].

## Phase 3: Development





The objective of the development phase is to produce learning materials based on the analysis completed in earlier phases.

This phase requires decisions to be made on:

- **Authoring tools for online and offline materials**

This is a significant decision for online module development. It is advisable to choose an off-the-shelf authoring tool that allows for:

- scenario-based learning
- software simulations
- completion tracking
- ease of updates and edits.

- **Review and feedback on learning**

Reviews of learning materials in order to secure stakeholder approval are an essential part of the development phase. To effectively manage review feedback, it is advisable to use an online collaborative tool that tracks:

- reviewers' feedback
- developers' comments and questions
- completion status in terms of incorporation of specific feedback.

This type of tool provides a feedback log that contributes toward facilitating approvals on learning materials.

- **Staged delivery**

Some learning programmes require sequential, staged delivery of training materials. For instance, a manager briefing information sheet goes out first, followed by an organisation-wide learning module. If this type of staged delivery is essential, it is important to confirm that any authoring tool and LMS used allows for it.

## **Output(s)**

This phase typically results in a variety of learning materials being produced in the development phase, as exemplified in the following:



**Immigration ONLINE – Student**

**What's new: AMS and DMS**

**Processing applications in AMS**

To identify online applications in AMS, check the **Summary** tab on the **Application Details** screen:

The **LOCATION** field shows the value **IGMS Online**.

The **Status** appears as **Accepted** from the time the application lands in AMS.

**Accessing DMS**

Forms and documents submitted through Immigration ONLINE are uploaded into the Document Management System (DMS). Double-click this icon on your desktop to open DMS:

Page 3 of 5

Information sheets / quick reference guides / job aids

**Immigration ONLINE – Student**

**Session agenda**

Welcome to this Skill+ Session on Immigration ONLINE – Student!

In this session, we will:

- Review recent developments in IGMS.
- Summarise the customer experience of using Immigration ONLINE – Student.
- Review how your work is impacted by Immigration ONLINE – Student.
- Discuss the interaction between Immigration ONLINE – Student, AMS and DMS
- Summarise the key benefits of Immigration ONLINE – Student.

Face-to-face / classroom-based training presentations

**Find documents**

IGMS Application ID: A66464

Search Advanced Search Upload

Modified Date: 1 - 11 of 11 results

Any Modified Date

You need to review the applicant's scanned passport pages.  
Select **Passport or Travel document** to proceed.

Pass	Client Name	AMS Client Number	AMS Application ID	IGMS Application ID	Submitted (NZT)	Document Classification	Client View	Trans
AMS Any	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	
134	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	
AMS Client Number								
Any AMS Client No.	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	
56439096 (11)	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	
Any IGMS Application ID	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	
A66464 (11)	Dara Sang	56439096	13423487	A66464	09 Apr 2015 12:08pm	In Confidence	Yes	

Document Category: Employer Supplementary

**39/41 Who signs off process changes?**

Sign-off of a process change is determined by:

- which branches own the business functions impacted by a change
- the degree of the impact of the change.

Drag the hand to view the approval hierarchy based on the level of impact.

	Single INZ branch impacted	Multiple INZ branches impacted
Approved by:	4 <sup>th</sup> tier manager responsible	4 <sup>th</sup> tier managers responsible
Example:	Opening a new Visa Application Centre with a current visa application centre provider.	

High-impact change  
Medium-impact change  
Low-impact change

Online learning modules featuring contextual, business and systems training followed by assessments (if necessary)



## Phase 4: Implementation



The objective of the implementation phase is to make approved learning materials available to learners.

This phase requires decisions to be made on:

- **Organisational communications**

Before making learning materials available on the LMS, it is advisable for the learning development team to:

- coordinate with MBIE's internal communications team to identify change communications channels
- decide on ways to leverage these channels and inform learners about the upcoming training
- provide the communications team with information on the content and context of the learning materials to aid the creation of appropriate messaging related to the training.

- **Hosting of learning**

The learning development team must decide on how to best use the capabilities of MBIE's LMS, [Learn@MBIE](#) in order to host learning materials.

- **Tracking and reporting**

Learning materials must be set up on the LMS in such a way as to allow managers and other interested parties to track and report on completion.

### **Output(s)**

The key output of the implementation phase is the distribution of learning materials to audiences. This is typically achieved by hosting learning materials on the LMS, [Learn@MBIE](#). Here is a sample course page on [Learn@MBIE](#):



## Phase 5: Evaluation



Evaluation is the final phase in learning development. The objective of this phase is to gauge the effectiveness of training by measuring or estimating:

- the uptake of training to meet go-live acceptance criteria
- the transfer of learned skills to the job
- any behavioural changes resulting from the training.

So far, only one evaluation exercise has been completed as part of Vision 2015. This was undertaken by Kineo after the deployment of learning materials supporting Immigration ONLINE – Student to ensure the design principles and solution were fit for purpose and repeatable for future releases.

A summary of the evaluation exercise concluded that the majority of feedback received on the training solution was very positive, with people appreciating the briefing sessions, modular learning approach and the level of technical details provided. Ownership of the training process was readily accepted by the business and the completion statistics of the different learning components was much higher than expected.

While leaders and learners accepted that there wouldn't be a learning environment for them to practice within, they still have a preference for that style of learning. Putting aside this learner preference for a test environment, Kineo believes that the learning approach adopted for Student with simulated environments can be successfully replicated for other IGMS deliverables, as long as there is additional support provided to integrate training and processes\*. A copy of the full evaluation is provided in the link below.

For future training evaluation exercises, it is recommended to follow Kirkpatrick's Four-Level Evaluation Model that records and documents:



- Level 1 - Reaction
- Level 2 - Learning
- Level 3 - Behaviour
- Level 4 - Results.

### **Output(s)**

The training evaluation for Immigration ONLINE – Student can be found in the following location [insert MAKO link] or is available on request from [insert business owner TT team or SDP].



## 3. Design and development principles

---

### Over-arching principles

Three over-arching principles guide the design and development of training materials:

1. As specified earlier, it is essential to maintain a strong orientation towards achieving learning outcomes.
2. Another key principle involves supporting re-branding and re-usability with a view to:
  - a. repurpose materials for on-boarding and induction if necessary
  - b. support ongoing business-as-usual training activities.
3. Learning is more effective when developed in consultation with experienced staff members and Subject Matter Experts (SMEs). It is essential to identify these contributors and collaborate with them throughout the process, from identifying learning outcomes to reviewing finished learning products.

### Additional principles

The following additional principles apply:

- Consider audiences' specific learning requirements and develop targeted, role-specific materials wherever possible that can be deployed just-in-time to support organisational changes
- Minimise time away from work for staff<sup>3</sup>, balanced with promoting cost-effectiveness with respect to the design, development, delivery, on-going maintenance and use of training, without compromising on quality
- Apply a modular structure to content, allowing learning to be broken down into fundamental and role-specific topics, ensuring concepts relevant to transition, such as workarounds and interim processes can be removed as required)
- Sequence the deployment of learning materials as well as the content within the learning materials in a way that promotes retention of information (while making training and resources available post go-live to enable reinforcement of learning)
- Leverage advanced content delivery, tracking and reporting capabilities of [Learn@MBIE](#).
- Use a blended learning approach that optimally leverages varied media to increase effectiveness of training. For example, leader-led change messaging and classroom-based training could be followed by an online system simulation and a quiz.
- Design training to maximise learner involvement, practice and application, as opposed to passive listening or reading.
- Support the development of expertise in branches and business units via the use of local Change Champions / Super Users.

---

<sup>3</sup> Responsibility for staff members' preparedness, release for and attendance at training sessions (or completion of online learning) lies with individual staff members and their business managers.



## 4. Roles and responsibilities

In addition to the typical roles included within a projector BAU release cycle, a range of business roles are critical in the design, development and implementation of training. Business roles are essential for conveying information, setting expectations and ensuring the time and focus required for training is provided.

The table below summarises the roles and responsibilities that the Vision 2015 Programme work to and which should be considered by future projects and BAU releases.

Roles	Responsibilities	
Sponsor	Has overall responsibility for the fitness-for-purpose of the project and end deliverables, ensuring business needs are met and clear ownership of benefits is decided and that these are realised in a cost-effective way.	
Business owner	Has overall accountability for the project deliverables and specifies the needs of those who will use the deliverables, ensuring quality expectations and acceptance criteria are met (the voice of the business in project delivery)	
Business Analysis & Transformation team	Responsibilities range from designing end-to-end business processes, gathering requirements, ensuring alignment to the operating model, benefits management and supporting implementation. Deliverables include capability specifications (requirements), options and recommendations papers, end-to-end processes and benefit models.	
MBIE Learning & Development (L&D) team	Ensure any training developed as part of a programme aligns with MBIE design and development principles and is responsible for the maintenance of training materials once the programme has been completed. The L&D team also help to provide context on how and when training can be most effectively delivered into different parts of the business, ensuring programme and BAU training delivery is as seamless as possible. The L&D team review all programme-generated training collateral.	
Training development team	Responsibilities and tasks align to the Analysis, Design, Development, Implementation and Evaluation (ADDIE) model, ensuring all materials developed for the programme are fit for purpose to meet learning needs and can be successfully transitioned to BAU.	
Project Manager(s)	Has overall responsibility for the delivery of each project through the project lifecycle. Is responsible for the day-to-day running of the project (within tolerances) on behalf of the Project Board, and ensures the projects produces results and delivers measurable benefits. The PM liaises with internal stakeholders / teams as well as external suppliers to develop key documentation. The PM also leads and motivates those contributing to the project from the business.	
Approver	Business Integration Manager	Programme plan alignment
	Business Solution Delivery Managers	Project delivery and project management oversight
	VS Change Implementation Director	Deployment and implementation



	Programme Director	Operating model, benefits and integration
	Process & Requirements Stream Lead	Processes / requirements align to the operating model
	Management Accountant	Budget
	Project Director (Technology)	System integration
Reviewer	Ensures deliverables will meet business requirements, provides a practical approach to executing business operations, and assures an integrated delivery	