DBPR PALM READINESS PROJECT
Workforce Readiness Plan

24 July 2024

Table of Contents

CONTACTS

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1.0 Overview

The Florida PALM Project is a multi-year state project undertaken to replace the antiquated Florida Accounting Information Resource (FLAIR) with a more modern web-based solution. The new system will result in extensive changes to include new Florida PALM Business Processes, new business and systems reporting capabilities, new chart of accounts values, all of which will require extensive learning and training for DBPR process owners. Areas of focus for this Workforce Readiness Plan include Florida PALM system training, education, introduction to and training in new business process workflows and agency strategic workforce planning.

The affected areas within DBPR include:

- ✓ DBPR Bureau of Finance & Accounting
- ✓ DBPR Bureau of Human Resources
- ✓ DBPR Bureau of Agency Services
- ✓ DBPR Bureau of Planning and Budget
- ✓ DBPR Division Offices

2.0 Workforce Readiness Approach

The objectives and scope of this DBPR Florida PALM Workforce Readiness Plan is to ensure readiness for the upcoming transition to the Florida PALM system and processes by providing extensive and comprehensive PALM education to include training and communication, and new business process workflow education for all process owners to ensure effective buy-in and ownership of the new system and process workflows. The primary objective of this Workforce Readiness Plan is to drive efficient and effective readiness for DBPR staff and provide a smooth transition for staff performing the processes in the new Florida PALM system..

3.0 DBPR PALM Workforce Readiness Plan Change Summary

Version	Date	Change Summary
1.0	12/15/2023	Initial Version Approved
2.0	08/02/2024	Updates: - Updated DBPR Florida PALM Impacted Workforce - Completed DBPR PALM Education Section - Completed DBPR PALM System Training Section - Completed DBPR PALM Future State Process Workflow Training Section - Added UAT, Florida PALM Training, and Train the Trainer Approach Section

4.0 DBPR Florida PALM Impacted Workforce

Name	Position Title	Position Number	Position Impact H/M/L	Office Location	Impacted Processes
Sally Huggins	Director of Administration	7910562	H	Tallahassee	DBPR Finance & Accounting, Agency Services, Budget, Human Resources
Jennifer Gaines	F&A Bureau Chief	79000005	H	Tallahassee	All Finance & Accounting Processes
Lyndell Francis	Professional Accountant Supervisor - SES	79010815	H	Tallahassee	Cost Allocation, Financial Reporting and General Ledger, Treasury, Cash Management, Accounts Receivable
Open Position	Accounting Systems Analyst	79010440	H	Tallahassee	Data Repository
Jessie Rideout	Accounting Services Supervisor II SES	79000024	H	Tallahassee	Treasury, Cash Management, Accounts Receivable
Michelle Stauffer	Accountant IV	79000001	H	Tallahassee	Bank Adjustments, DMS journal transfers, FTP Morning Upload, Remittance
Nicole Manuel	Revenue Specialist II	79000014	H	Tallahassee	Debit Memos
Tyrin Watts	Accountant II	79010336	H	Tallahassee	Morning Refund Process
Alice Ibarra	Professional Accountant Specialist	79010386	H	Tallahassee	Cash Balance Checking, Disinvestments, Investments
Kelly Edmunds	Senior Professional Accountant	79010014	H	Tallahassee	Cash Balance Checking, Disinvestments, Investments, Debit Memos
Kristopher Burnside	Accounting Service Administrator	79010262	H	Tallahassee	Disbursements, Accounts Payable, Voucher
Tonya Washington	Accounting Services Supervisor II	79010814	H	Tallahassee	Disbursements, Accounts Payable, Voucher
Open Position	Accountant IV	79001005	H	Tallahassee	FLAIR Non-MFMP Invoices, Contract Payments, Journal Transfer Payment Processing, Lease Payments
Lacy Horton	Accountant III	79000009	H	Tallahassee	AB&T Distribution Payments, Florida Bar Dues, CPA Minority Scholarship Payments, DMS Telephone, Journal Transfers, People First Assessment, Recovery Fund Payments, Risk Management Casualty Insurance Premium Payments, Verizon & T-Mobile Wireless Payments, Wright Express, Reemployment Tax Reimbursement

4.0 DBPR Florida PALM Impacted Workforce (Cont.)

Name	Position Title	Position Number	Position Impact H/M/L	Office Location	Impacted Processes
Michelle Ashmore	Accountant III	79010263	H	Tallahassee	Purchasing Card and Travel Payments
Open Position	Accountant II	79000980	H	Tallahassee	MFMP Payments
Elizabeth Humphries	Accountant II	79001023	H	Tallahassee	MFMP Payments
Kristyn Smith	Administrative Assistant II	79000015	H	Tallahassee	Voucher Assembly, Warrants
Open Position	Accountant IV	79000007	H	Tallahassee	Purchasing Card Administration
Darius Pelham	Budget Bureau Chief	79000499	H	Tallahassee	All DBPR Budget Processes
Debbie McCoy	Senior Management Analyst II	79000686	H	Tallahassee	Budget Processes
Joyce Masterson	Senior Management Analyst II	79001349	H	Tallahassee	Budget Processes
John Sherer	Senior Management Analyst II	79011049	H	Tallahassee	Budget Processes
Fatimah Harper	Human Resources Bureau Chief	79010842	H	Tallahassee	All DBPR Human Resources and Payroll
Stacie Stanfill	Human Relations Manager	79000944	H	Tallahassee	All DBPR HR Payroll Processes
Melvin Robinson	Senior Management Analyst Supervisor SES	79000802	H	Tallahassee	All DBPR HR Payroll Processes
Andrea Spencer	Human Resource Analyst/CBJA - SES	79000028	H	Tallahassee	All DBPR HR Payroll Processes
Carmelita Graham	Agency Services Bureau Chief	79010517	H	Tallahassee	All Agency Services Processes
Alrick Austin	Management Review Specialist - SES	79010523	H	Tallahassee	Inventory & Property Control
Open Position	Government Operations Consultant II	79010428	H	Tallahassee	Inventory & Property Control
Ashley Strickland	Management Review Specialist – SES	79010448	H	Tallahassee	Procurement
Alexzandria James	Purchasing Agent III	79000957	H	Tallahassee	Procurement
Christopher Gergen	Government Operations Consultant	79011529	H	Tallahassee	Procurement

5.0 DBPR Florida PALM Education

FLORIDA PALM EDUCATION	Delivery Method	Pertinent Staff	Scheduled Timeline
- Reinforce / Educate Team on reason for PALM Conversion - Florida PALM Project Timeline - FLORIDA PALM Website Walkthrough	Meeting	ALL STAFF	Aug. 2024
- Review and discuss new PALM Treasury Correspondence Form - PALM SAM Request and Acknowledgement Form - Develop PALM SAM Change Process Flow	Meeting	ALL STAFF	Aug. 2024
- Present and discuss PALM End User Roles Job Aid - PALM Roles and Access Presentation - Provide new PALM Work Centers Overview	Meeting	ALL STAFF	Aug. 2024
- Present and discuss new PALM Ticket Request Form - PALM User Support FAQ's - Discussion of Florida PALM Batch Schedules	Meeting	ALL STAFF	Aug. 2024
- Present and discuss PALM Chart Field Definitions - Present PALM COA Learning Tool - Discuss FLAIR Data Elements vs. Florida PALM Chart Fields and resulting changes.	Meeting	ALL STAFF	Aug. 2024
- Attend Florida PALM Workshops	Meeting	DBPR LEADERSHIP	Aug. 2024-Sept 2024
- PALM Supported Web Browsers Job Aid	Email	ALL STAFF	Aug 2024
- As additional PALM Education material is developed by OCM Lead and Florida PALM Project Team, present to staff and update Workforce Readiness Plan	Meeting / Email	ALL STAFF	ONGOING

6.0 DBPR PALM System Training

FLORIDA PALM SYSTEM TRAINING	Delivery Method	Pertinent Staff	Scheduled Timeline
General Navigation Video	Meeting	ALL Staff	AUG 2024
Chart Field Structure Request Demo Video	Meeting	ALL Staff	AUG 2024
Customizing Your Homepage in Florida PALM	E-Mail	ALL Staff	AUG 2024
Report Query Overview / Presentation	Meeting	ALL Staff	AUG 2024
Taking Florida Palm Training Overview	Meeting	ALL Staff	AUG 2024
Present and discuss Florida PALM End User Manual	Meeting	ALL Staff	AUG 2024
Enter a Regular Voucher Demo Video	Meeting	All Finance & Accounting Staff	AUG 2024
Creating an Encumbrance Demo Video	Meeting	Disbursements Staff	AUG 2024
Registering a Supplier Demo Video	Meeting	Disbursements Staff	AUG 2024
Submitting a Supplier Change Request Demo Video	Meeting	Disbursements Staff	AUG 2024
Manual Deposit Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Inbound Deposit Spreadsheet Upload Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Create A/R Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Create A/R Deposit Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Create Customer Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
PALM Disinvestments Overview	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Create Maintenance Worksheet Demo Video	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Mobile Inventory Demo Video	Meeting	Agency Services Property Control	OCT 2024
Manage Agency Allotments Demo Video	Meeting	Budget	OCT 2024
Perform User Acceptance Testing UAT	Meeting	ALL BUSINESS AREAS	APR 2025 - NOV 2025
Accomplish Train the Trainer System Training – Train Agency Staff	Meeting	DBPR Leadership Team	MAY 2025 - AUG 2025
Attend official PALM Training	Meeting	ALL STAFF	JULY 2025- NOV 2025
TRAIN the TRAINERS will complete Agency Specific Training	Meeting	ALL STAFF	Oct. 2025 – Dec. 2025
Note: Will train staff on new Demo Video's and additional System Training as developed by PALM Training Team	Email, Meeting	ALL STAFF	ONGOING

7.0 DBPR PALM Future State Process Workflow Training

FLORIDA PALM BUSINESS PROCESS TRAINING	Delivery Method	Pertinent Staff	Scheduled Date
Perform Role Mapping for Disbursements / Accounts Payable / Vouchers - Identify PRIMARY AND BACK-UP staffing for each role. - Identify logical CROSS-TRAINING Opportunities.	Meeting	Disbursements Staff	AUG 2024
Perform Current State to Future State Process Flow & New PALM Reports Crosswalks - Identify Process SIPOC (Suppliers, Inputs, Process, Outputs, Customers) - Identify Process CTQ's (Critical to Quality process steps) - Analyze and scrutinize all business and technical process steps and new PALM reports for logical flow and assurance that reports and technology will support process effectively. - Report any identified gaps in process flows and reports or need for new Business Requirements to DFS PALM Readiness Coordinator. - Identify logical cross-training opportunities. - Train staff to quickly identify process improvement opportunities and how to conduct root cause analysis to eliminate process defects.	Meeting(s)	Disbursements Staff	AUG 2024
Perform Role Mapping for Cost Allocation, Financial Reporting and GL, Treasury, Cash Management, Accounts Receivable - Identify PRIMARY AND BACK-UP staffing for each role. - Identify logical CROSS-TRAINING Opportunities.	Meeting	Revenue & Financial Reporting Staff	SEPT 2024
Perform Current State to Future State Process Flow & New PALM Reports Crosswalks - Identify Process SIPOC (Suppliers, Inputs, Process, Outputs, Customers) - Identify Process CTQ's (Critical to Quality process steps) - Analyze and scrutinize all business and technical process steps and new PALM reports for logical flow and assurance that reports and technology will support process effectively. - Report any identified gaps in process flows and reports or need for new Business Requirements to DFS PALM Readiness Coordinator. - Identify logical cross-training opportunities. - Train staff to quickly identify process improvement opportunities and how to conduct root cause analysis to eliminate process defects.	Meeting(s)	Revenue & Financial Reporting Staff	SEPT 2024
Perform Role Mapping for Asset & Inventory Management, Budget, and Human Resources - Identify PRIMARY AND BACK-UP staffing for each role. - Identify logical CROSS-TRAINING Opportunities.	Meeting	Agency Services Property Control, Budget, Human Resources	OCT 2024
Perform Current State to Future State Process Flow & New PALM Reports Crosswalks - Identify Process SIPOC (Suppliers, Inputs, Process, Outputs, Customers) - Identify Process CTQ's (Critical to Quality process steps) - Analyze and scrutinize all business and technical process steps and new PALM reports for logical flow and assurance that reports and technology will support process effectively. - Report any identified gaps in process flows and reports or need for new Business Requirements to DFS PALM Readiness Coordinator. - Identify logical cross-training opportunities. - Train staff to quickly identify process improvement opportunities and how to conduct root cause analysis to eliminate process defects.	Meeting(s)	Agency Services Property Control, Budget, Human Resources	OCT 2024
Update Business Areas on all changes to process flows - As recommended process flow changes are approved, update process owners on changes / updates. - If system steps currently identified within process flows cannot be accomplished, create workarounds to accomplish processes.	Meeting	ALL AREAS	OCT 2024

8.0 DBPR Workforce Readiness Plan Supporting Material

The following supporting material was utilized to develop this Workforce Readiness Plan along with material within the Florida PALM Project website.

To View DBPR PALM Readiness Project Communication Management Plan click HERE

To View DBPR PALM Readiness Project RACI Chart click HERE

To View DBPR PALM Readiness Project Process Tracking Spreadsheet click HERE

9.0 User Acceptance Testing (UAT), Florida PALM Training, Train the Trainer Approach

As described in the User Acceptance Testing Approach, the first opportunity agencies will get to experience "hands on keys activities" in the Florida PALM system for Financials and Payroll Waves will be when agency identified subject matter experts (SMEs) and participants attend and participate in User Acceptance Testing (UAT). UAT is scheduled to begin in April 2025 with a kick-off session, followed by two months of face-to-face sessions for the identified participants. Materials will be provided by the Project and will focus on providing instruction as to how to perform activities in the new Florida PALM system, including how to navigate within the system and process steps to ensure successful participation in UAT.

After the first two months working in the UAT environment, having hands-on experience, and working alongside Project Team members, agency SME participants will then take the UAT training materials and knowledge they have gained back to their agency. This is when the agency SMEs will work with other end users in the UAT environment using Florida PALM process steps to complete activities using agency specific values, policies and procedures, and interfaces. Agencies will have approximately six months to practice completing "work activities" using the UAT environment.

Beyond the Project-led UAT sessions, there will be more formal training planned to begin in July. Users will be able to participate in self-guided or instructor-led training to see it and try it in a controlled, generic training environment. (It should be noted that not all training will be instructor-led. Some will be video or self-study based.) This overlaps with the UAT timeline, where users will be expected to access the UAT environment to "see it and try it" in a version of Florida PALM that is configured for their agency.

Train the Trainer (TTT), a Training Survey (RW Task 549) will be coming out in the next month which will ask agencies to indicate if they want to participate in TTT. The selection to participate means that the agency choses to provide any instructor-led training directly to their end users instead of the Project Trainers providing the instructor-led training.

10.0 Signature and Acceptance Page

Signature: *Sally Huggins*   Date: 8/1/2024

Print Name: Sally Huggins

Title: Director of Administration

Agency: Department of Business and Professional Regulation

Role: Sponsor

Signature: *Jennifer Gaines*   Date: 8/1/2024

Print Name: Jennifer Gaines

Title: Bureau Chief Finance & Accounting

Agency: Department of Business and Professional Regulation

Role: Agency Liaison