Task Instructions

Task ID: 549
Task Name: *Submit Training Survey*
Task Start Date: *August 12, 2024*
Task Due Date: *September 20, 2024*
Project Impact: *Direct*

Task Description

Complete and submit the Training Survey to identify if your agency will participate in the Train-the-Trainer Program.

Task Overview

The Florida PALM Project (Project) will provide training to prepare end users to use Florida PALM to support their business and reporting processes with the Financials and Payroll Waves go live. As described in the Training Approach, the Project will provide end user training and training materials using various methods incorporating *Read It, Watch It, Do It* methodologies, including:

- written materials (e.g., step-by-step guides, job aids, and an End User Manual)
- web-based training (e.g., topic-based self-guided learning and videos)
- instructor-led training (ILT) and instructor-facilitated training (IFT) (e.g., live educational opportunity)

Not every Financials or Payroll learning topic will be included in a formal instructor-led course. Many of the topics can and will be learned through the other training methods, including through exposure during UAT. The instructor-led courses will be developed and delivered for more complex topics and or topics that require more guided conversation. The Florida PALM-specific courses will be in or using the Training environment, which will include generic security roles and configurations not specific to any particular agency or end user.

No matter the method, end user training is a shared responsibility of the Project and agencies. In addition to Project-provided training, agencies are required to develop and deliver agency-specific training focused on understanding and applying the Florida PALM business processes and agency-specific values (e.g., ChartField values, processes changes) their end users will use (RW Tasks 568, 607, 607, and 625).

To augment Project-provided training, the Project team may offer agencies an additional opportunity to participate in a Train-the-Trainer (TTT) program. Based on survey responses provided for this task, the Project will evaluate agency interest in participating in a TTT program and create a program that includes the agencies that meet the demonstrated need and commitment to participate. The selected agencies and agency-identified trainers will partner with the Florida PALM Training, Education and Development (TED) team by participating in the TTT program, during May - August 2025 (RW Task 603).

NOTE: *TTT is an **optional** program. Agencies who choose not to participate will still have access to all Project-provided end user training.*

What is Train-the-Trainer?

TTT will be a framework designed to prepare agency trainers to learn to deliver and practice delivering Florida PALM-specific training as Project co-trainers. The TED team will develop and deliver the TTT program to selected agency trainers for agencies that have expressed interest

and shown the need. Participation in the TTT program will require a commitment from participants to deliver a minimum of one to two Project-hosted training sessions as a Florida PALM co-trainer. Once participants complete the program, have demonstrated successful delivery of the Florida PALM-specific training materials to various agencies in conjunction with Project trainers, agency TTT participants will then provide Florida PALM training directly to their agency end users.

As a result of completing TTT, participants will be able to apply current practices in delivering Florida PALM-specific training on specific process activities. The components of the TTT program will be defined as part of the ILT Plan, but participants may expect:

- Opportunities to learn and practice delivering instructor-led training sessions on Project identified training courses and topics.
- Instruction on how to present Florida PALM information effectively, respond to end user questions, and lead activities that reinforce learning.
- An Instructors Guide containing training materials and speakers' notes to support delivery of Florida PALM training.
- Experience as a Project co-trainer, delivering a minimum of one to two ILT sessions to end users.

NOTE: *Participation in the TTT program will not prepare agencies for delivering agency-specific training nor will it provide early access for end users to Florida PALM training.*

Should Your Agency Participate in Train-the-Trainer?

Your agency's determination to participate in the TTT program should be based on "need" and "commitment". Figure 1 provides a visual depiction of the decision tree, starting with determining the need.
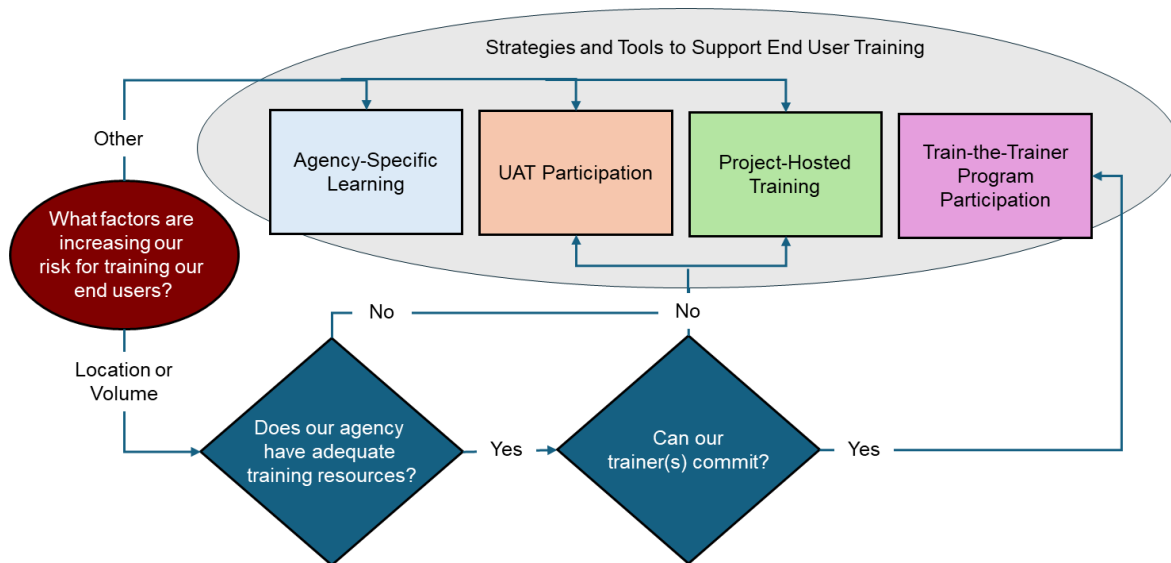

Figure 1: Train-the-Trainer Participation Determination Flow

Need

Consider TTT as a strategy to handle the risk related to all agency end users receiving the training they need to be ready at go live. This "need" is shaped by the number of end users performing certain processes, their location, or their ability to complete training presented in forms other than live instruction. The level of risk may also be different depending on the process area (e.g.,

Business Process Grouping (BPG)), especially those that have a higher degree of process change for your end users within Florida PALM.

When evaluating your agency's **need**, consider such factors as:
- the number of end users your agency will have in Florida PALM;
- your users' location around the State;
- your users' understanding of their current state processes (e.g., what and why they perform their functions in FLAIR today);
- your users' anticipated participation in UAT and how that will impact their learning of how to perform their functions in Florida PALM; and
- the impact or level of planned use of Florida PALM (e.g., the amount of their routine processes that will be in Florida PALM).

Not having a higher volume of end users or locations does not mean your agency does not need special strategies to reduce training risk. There are agency-specific learning strategies targeted at the needs of your specific users (e.g., ChartField crosswalks, agency processes and procedures overviews) that can be employed now or through go live. There is also your end users' participation in your agency's UAT activities that is a critical strategy for enhancing end users' familiarity, confidence, and abilities in Florida PALM. The UAT environment and experience with your agency-specific values and configuration is an invaluable risk mitigation tool which should be leveraged to reduce the risks to your agency.

Commitment

If your agency is considering participating in the TTT program, you should understand it will require a significant commitment of time for your selected trainer(s). The TTT program will focus on the mechanics of delivering Project-developed training to end users, providing participants with the information needed to help end users link the training to the completion of their jobs, and offering practical training experience. It will require that your trainer(s) demonstrate their acquired knowledge and abilities through co-training before completing the program.

When considering individuals to participate in the program, it is essential to identify individuals with the appropriate skill set to deliver training. Skills associated with effective delivery of training include such things as:
- *Strong communication skills:* public speaking, active listening
- *Knowledge of subject matter:* understanding of the process area to be delivered
- *Interpersonal skills:* patience, flexibility, empathy
- *Facilitation skills:* leading discussions, encouraging participation, managing group dynamics
- *Technical skills:* proficiency with training tools such as presentation software
- *Organizational and planning skills:* time management, session planning, adaptability

Identifying and selecting suitable participants for TTT involves understanding their background, experience, communication skills, availability, and readiness to take on the time commitment of an instructor or training role. They should have an interest in expanding their knowledge, be open to feedback, and be respected by their colleagues.

When determining your agency's **commitment**, consider your resource needs to design and develop agency-specific training and if you have a trainer(s) who can focus on participating in the TTT program and delivering the training to your agency end users (your identified *need* above) on Florida PALM-specific training.

Task Elements

This task consists of two elements.

1. Determine your interest in participating in TTT
2. Complete the Training Survey

Determine Your Interest in Participating in TTT

The Training Approach document provides an overview of expectations for end user training and learning development, including the shared responsibility between the Project and agencies. Using the information about the approach to training as well as the understanding of your agency end users, assess your agency risks regarding training. Finally, review the decision tree shown in Figure 1 above and determine your agency's **need** and **commitment**. How you answer the questions will help you decide if your agency is interested in participating in the TTT program.

Complete the Training Survey

Once your agency has made an informed decision, Agency Sponsors are required to complete and submit one Training Survey for their agency using this link: Training Survey.
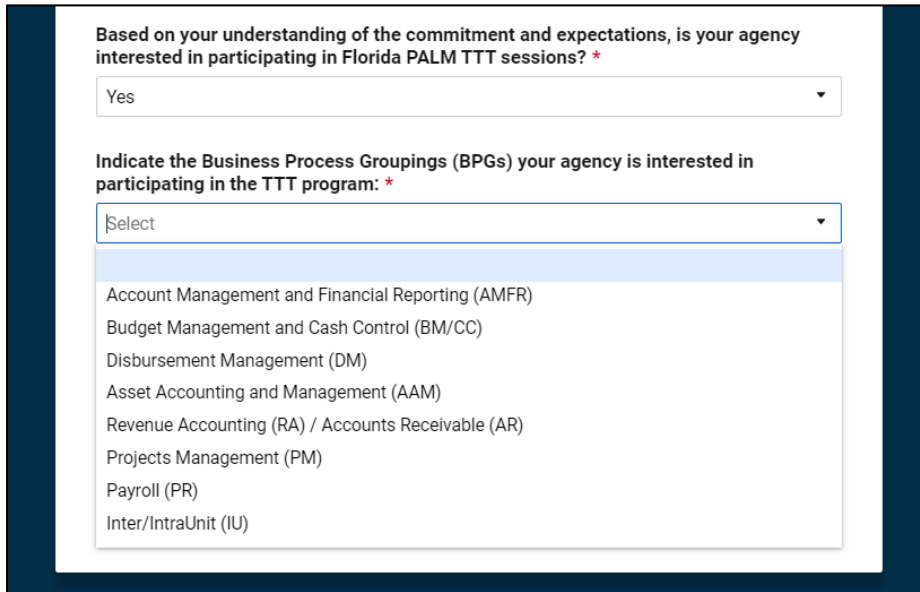
Figure 2: Training Survey

The Training Survey is answer-based, meaning that questions are hidden and will appear based on your agency's response.

If your agency answers "**No**" indicating your agency is not interested in participating in the Florida PALM TTT sessions, no additional survey questions are required, and you may submit the survey.

If your agency answers "**Yes**", indicating your agency is interested in participating in the Florida PALM TTT sessions, additional fields will display and require the following pieces of information:

- Indicate the Business Process Groupings (BPGs) your agency is interested in participating in the TTT program by selecting the name of each BPG so that it appears in the cell. Available values include:
  - Account Management and Financial Reporting (AMFR)
  - Budget Management and Cash Control (BM/CC)

- o Disbursement Management (DM)
- o Asset Accounting and Management (AAM)
- o Revenue Accounting (RA) / Accounts Receivable (AR)
- o Projects Management (PM)
- o Payroll (PR)
- o Inter/IntraUnit (IU)

Figure 3: Training Survey

- For each BPG selected:
  - o Describe the end user group(s) you intend to deliver the training to for your agency and the location(s) for which you intend to deliver the training (e.g., city, region). Be thorough in your description so that the Project may fully determine the need of your agency and the risk that your participation will address.

  - o Provide the preliminary list of names of your Train-the-Trainer participants. You will be asked in RW Task 579 to provide the final list, if selected to participate in the TTT program. Each name on this list should be capable and available to support the co-training requirement and then serve as the TTT for the identified BPG. In the field, provide:
    - Participant name
    - Current role / position within your agency
    - Experience providing training

Indicate the Business Process Groupings (BPGs) your agency is interested in participating in the TTT program: *

Account Management and Financial Reporting (AMFR) ✕

For Account Management and Financial Reporting (AMFR):

Please describe the end user group(s) you intend to deliver the training to for your agency and the location(s) you intend to deliver the training (e.g., city, region): *

List the Train-the-Trainer participant(s) for Account Management and Financial Reporting (AMFR). Each name on this list should be capable and available to support the co-training requirement and then serve as the TTT for the identified BPG.

AMFR TTT Participant 1 *
1. First and Last Name
2. Current Role / Position within Agency
3. Experience providing training

Would you like to add another participant for AMFR? *

Select

☐ Send me a copy of my responses

Submit

Figure 4: Training Survey

- Submit the Training Survey and mark your agency Readiness Workplan Task Tracker to 100% Submitted for Task 549.

How will agencies use this information?

Information captured in your Training Survey will support these future tasks:

- Task 568 – Create Training Plan for Agency Managed End User Training
- Task 588 – Confirm and Prepare Participants for Train the Trainer (if applicable)
- Task 613 – Participate in Florida PALM Training

What will the Florida PALM Team do with this information?

The Project team will review the results of the training survey to:

- Determine agency interest.
- Identify potential, viable agencies for a TTT program, based on demonstrated need and commitment, and factor that into the Project's training delivery planning.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 1: Task Completion Rubric

Task Completion Rubric
The agency has submitted the Training Survey with indicator of "yes" or "no" to interest question.
For agencies indicating a "yes" to the interest question, all required subsequent information is provided: BPG(s) selection; end user group description; participant description.
The task tracker has been marked as 100% complete for this Task.

Task Instructions

Collaborate with your agency Training Liaisons and CCN to decide if your agency should participate in TTT. Complete this task by submitting one survey for your agency and updating the RW Task Tracker to 100%.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Determine if your agency as interest in participating in Train-the-Trainer.*
2) *Agency Sponsor submits the training survey.*
3) *Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.*
4) *Complete task by* **September 20, 2024.**
5) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
6) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- Training Approach
- Training Survey