

## Task Instructions

Task ID: 502

Task Name: *Create Agency Specific Risks and Issues Management Plan*

Task Start Date: *October 9, 2023*

Task Due Date: *December 15, 2023*

### Task Description

Create or update a plan to identify and manage agency specific risks and issues for Florida PALM implementation.

### Task Overview

Florida PALM is a state-wide business transformation that requires each state agency to plan and execute activities necessary to ready their people, processes, technology, and data for implementation. For a transformation of this magnitude to be successful, agencies must adopt project management techniques, strategies, and methodologies that make sense for their organization. Managing activities necessary to implement Florida PALM as a project within your agency will help you be successful.

This task is one in a series of project management tasks that allow your agency to address the critical components of project planning. As you are working on these concurrent Project Planning tasks, consider how they relate to ensure alignment across your project plans.

- 500 – Create Agency Specific Project Charter (Released 10/02/2023)
- 501 – Create Agency Specific Implementation Schedule (Releasing 10/09/2023)
- **502 – Create Agency Specific Risks and Issues Management Plan**
- 503 – Create Workforce Readiness Plan (Releasing 10/16/2023)



Risks and issues management is a critical component of success when managing any project. A Risks and Issues Management Plan documents the process, roles and responsibilities, and mechanism for identifying, logging, monitoring, and resolving risks and issues for a project.

### Elements of a Risks and Issues Management Plan

Your Risks and Issues Management Plan will document a systematic approach to identify, assess, mitigate, and monitor potential risks and issues that arise during implementation of Florida PALM within your agency. The Risks and Issues Management Guide has been developed to support agencies in the development of the Risks and Issues Management Plan. Below are recommended elements to include in your agency specific Risks and Issues Management Plan.

- Risks and Issues Management team
  - Identify staff and leadership roles responsible for Risk and Issue Management
  - Define how frequently the Risk and Issue Management team will meet to:

- Discuss newly identified risks and issues
- Review and update current risks and issues
- Process to identify, evaluate and control risks
  - Define how risks will be identified
  - Identify where all risks are logged and updated as mitigation strategies are implemented (*Agencies may use the Risks and Issues status reporting sheets in Smartsheet*)
  - Define the risk scoring methodology
  - Document how risks will be managed (e.g., mitigated, monitored)
- Process to identify, evaluate and resolve issues
  - Define how issues will be identified
  - Identify where all risks are logged and updated
  - Define the issue evaluation process
  - Document how issues will be managed to resolution (e.g., monitored, reported)

### How will agencies use this information?

Agencies will use the Agency Specific Risks and Issues Management Plan to:

- Identify and address risks and issues as they arise throughout life of project
- Assign a score of probability and impact to risks and priority to issues
- Determine management strategies for each identified risk and resolution plans for issues

Subsequent, recurring readiness workplan tasks to *Manage Agency Specific Implementation Schedule, Risks and Issues* and *Submit Bimonthly Agency Readiness Status Report* through go-live provide agencies a cadence to follow their management plan and provide updates to stakeholders as risks and issues arise and are resolved.

The Risk and Issue Management Plan should be posted to internal agency websites used to share project information. Access to this information by your agency's CCN and internal stakeholders can help to promote awareness and support for risk management and issue resolution efforts.

### How can Florida PALM use this information?

#### **Florida PALM Use: Informational**

This and your agency's other project management tools (e.g., Project Charter, Implementation Schedule) are critical resources for your agency's readiness for Florida PALM. Uploading your completed documents to your Readiness Workplan Task Tracker will allow the Florida PALM Project team access to the information to gain insights into your agency's unique planning or project management efforts, and to identify trends across agencies. Collectively the readiness tasks provide the Florida PALM Project team insights that allows us to better assist each agency.

### Task Instructions

Draft or update your agency-specific Risk and Issues Management Plan through collaboration with key stakeholders and your agency CCN using the elements described above and supporting resources provided below. Track progress in your Readiness Workplan Task Tracker. Attach your Agency Specific Risks and Issues Management Plan document to the Readiness Workplan Task Tracker. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%.

<b>Instructions</b>
<i>1) Collaborate with your Change Champion Network, Agency Sponsor and key stakeholders to draft or update a Risks and Issues Management Plan</i>
<i>2) Track and record task progress in the Readiness Workplan Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.</i>
<i>3) Submit the plan by attaching it to the row of the task in the Readiness Workplan Task Tracker.</i>
<i>4) In Smartsheet, update the Readiness Workplan Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
<i>5) If you have questions regarding the Create or Update Risk and Issues Management Plan task, participate in or review the Tuesday Task Talk on Tuesday, October 10, 2023, or contact your Readiness Coordinator.</i>

### Supporting Materials and Resources:

- [Florida PALM Project Management Plan](#), Section 9 Risk Management
- [Florida PALM Project Management Plan](#), Section 11 Issue Management
- [Florida Digital Services - Project Management and Oversight Resources](#)
- [Florida PALM Risk and Issue Scoring Supplemental](#)
- [Risk and Issue Management Guide Supplemental](#)