

Task Instructions

Task ID: 535

Task Name: *Update Workforce Readiness Plan*

Task Start Date: *June 17, 2024*

Task Due Date: *August 2, 2024*

Project Impact: *N/A*

Task Description

Update Workforce Readiness Plan based on End User Survey results.

Task Overview

Florida PALM is a statewide 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.

A Workforce Readiness Plan provides a framework to effectively engage impacted stakeholders within the agency's workforce during periods of change, such as organizational restructuring, process improvements, or technology implementations.

You previously created your Workforce Readiness Plan in Task 503. This task (535) is the first of a series of tasks where you are required to update your Workforce Readiness Plan. Updating your Workforce Readiness Plan at specific points in the project timeline will help prepare your workforce for the Florida PALM Implementation in January 2026.

- ✓ 503 – Create Workforce Readiness Plan (10/16/2023 – 12/15/2023)
- **535 – Update Workforce Readiness Plan (06/17/2024 – 08/02/2024)**
- 585 – Update Workforce Readiness Plan (02/03/2025 – 03/14/2025)
- 608 – Update Workforce Readiness Plan (06/02/2025 – 08/29/2025)

Maintenance of the Workforce Readiness Plan is an essential process your agency must perform to continue to analyze its workforce and determine steps needed to meet current and future staff needs, maintain effective communication, and address workforce attrition concerns.

Task Elements

Your agency has recently identified future Florida PALM End Users (Task 512) and surveyed those end users (Task 524). Using your future Florida PALM end user list and the results of your end user survey analysis, you can now update your Workforce Readiness Plan to better define your workforce, identify and address knowledge gaps, and begin implementing your approach.

This update of your agency's Workforce Readiness Plan includes the following:

1. Update Impacted Workforce

In your original Workforce Readiness Plan, you identified your impacted workforce, including their level of change impact and location, and documented any known or anticipated vacancies. You have since completed Task 512, developing a comprehensive list of your future Florida PALM end

users. It is best practice to maintain your list of future end users over time, refining and updating as you learn more about Florida PALM functionality and as end users come and go within your agency. An accurate listing will also help inform your updated Workforce Readiness Plan. So, now is a good time to go back and review your list, which can be found in your Agency's Implementation End Users worksheet in Smartsheet.

For this RW Task, using information gathered since the completion of Task 503, review and update the impacted workforce section in your Workforce Readiness Plan, considering the following questions and scenarios:

- *Have you identified new stakeholders that should be included?*
 - This can include those directly or indirectly impacted by Florida PALM transformation activities. Direct impact can include those who use FLAIR today (e.g., log into FLAIR) to perform their duties and responsibilities. Indirect impact can be those that rely on information from FLAIR for decision making.
 - When identifying staff directly or indirectly impacted, consider that this will include agency leadership, subject matter experts, managers of end users, end users, data users and/or external parties.
- *Have all locations been included?*
 - Consider your agency stakeholders and workforce in districts, regions, divisions, and field offices.
 - Location of staff may impact future user acceptance testing and training plans, communication plans, and engagement approach.
- *Are there any new anticipated vacancies to document?*
 - Identify potential attrition impacts resulting from the departure of employees from the agency for any reason (voluntary or involuntary), including resignation, termination, or retirement.
 - Consider recent agency retention or recruitment efforts and any impacts to your workforce. For example, any critical workforce roles that are currently or anticipated to be vacant impacting your successful Florida PALM implementation. These are risks that should have been identified in your [Agency] Risks worksheet.

2. Update Assessment of Workforce Knowledge and Understanding of Current State

When you first created your Workforce Readiness Plan, you established a baseline by assessing your agency workforce's knowledge, competencies, and understanding of current agency business processes. For this RW Task, using information gathered since the completion of Task 503, review and update your previous assessment, considering the following questions:

- *Have you taken measures to address any previously identified knowledge or skills gaps?*
- *Are there any new gaps in knowledge or skills that have been identified that need to be addressed?*
- *What is your targeted plan to address any remaining knowledge or skills gap?*

3. Update and Implement Workforce Readiness Approach

Your Workforce Readiness Approach provides the framework your agency should be using to ready the "people" critical operational element of your agency's transition to Florida PALM. The approach should include a detailed action plan that outlines the key activities, communications, responsibilities, and timelines for the approach to meet workforce needs.

Key Activities

For this RW Task, using information gathered since the completion of Task 503, review and update your key activities. As you update the key activities in your workforce readiness approach, be sure to incorporate your end user readiness survey analysis action items identified as part of Task 524.

The RW tasks can be a source of information you can share to increase workforce readiness. From the RW, additional key activities in your approach may be:

- Sharing identified change impacts (Tasks 515, 527, 543, and 560)
- Sharing information about Chart of Account changes and your agency-specific configuration values (Tasks 513 and 541)
- Sharing changes to your agency business systems that may impact your end users (Tasks 504, 516, 528, 544, and 558)
- Sharing data cleansing progress (Tasks 514, 526, and 542)
- Sharing your plan for User Acceptance Testing (Task 536)

Communication Plan

For this RW Task, using information gathered since the completion of Task 503, review and update your communication plan to align with any updates to your identified workforce, assessment of workforce knowledge and understanding, and key activities. The plan should include your agency's approach to engaging key stakeholders and workforce groups, including senior management, department heads, managers of end users and end users, to gain awareness and support of workforce planning efforts and activities.

The plan should identify your communication needs for the specific audience or group, the objective/purpose of the communication, the frequency, and the distribution method and content of communications. Consider using various channels in your strategy such as emails, agency intranet and meetings (virtual or in-person) and consider what they need to know about workforce changes.

Responsibilities and Timeline

For this RW Task, using information gathered since the completion of Task 503, review and update the responsibilities and timeline to align with all other updates in your Workforce Readiness Plan.

Example responsibilities can include:

- A Workforce Readiness Plan coordinator responsible for maintaining the plan
- Individual or team who is responsible for each key activity in your plan
- Individual or team that regularly review and update the Workforce Readiness Plan throughout the project lifecycle

Example timeline elements can include:

- Dates for working or completing key activities for learning and development, for addressing workforce vacancies, and communications
- Agreed upon cadence for reviewing and updating the Workforce Readiness Plan

4. Create / Include a Change Summary

Provide a summary of the updates to your Workforce Readiness Plan. Change summaries are often included at the beginning or end of a document and are sometimes formatted into a table. At a minimum, the summary should include the date the change was made and a brief summary of updates made. An example change summary template has been provided in Table 1.

Table 1: Sample Change Summary Table

Version	Date	Change Summary
1.0	12/15/2023	Initial version approved.
2.0	08/02/2024	Updated Identified Workforce section: added field offices and out of town divisions. Updated Workforce Knowledge section: added new activity to include current FLAIR end users to review and validate current state business process documentation. Updated Approach: added new key activities and updated communication plan to share new configuration values and COA changes.

How will agencies use this information?

Updating your Workforce Readiness Plan can help your agency by:

- Identifying staffing needs and skillsets across multiple levels within your agency, supporting both short- and long-term goals for workforce alignment
- Identifying and aligning your agency workforce with business plans to target and prioritize skill requirements and transition strategies
- Supporting organizational change efforts and creating a readiness plan for your future workforce

Tips:

- *Activities from your Workforce Readiness Plan should be included in your Agency Specific Implementation Schedule (Tasks 533 and 539).*
- *Agency-specific readiness activities or identified risks and issues related to their updated plan should be reported in your Bimonthly Agency Readiness Status Reports.*

How will Florida PALM use this information?

Florida PALM Use: Informational

This and your agency’s other project management tools (e.g., implementation schedule, risk and issue management plan) 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 allow us to better assist each agency.

Table 2: Task Completion Rubric

Task Completion Rubric
Updated Workforce Readiness Plan has been attached to the Task 535 row in the Readiness Workplan Task Tracker.
The Updated Workforce Readiness Plan includes the following updated sections, at a minimum: <ul style="list-style-type: none"> • Impacted Workforce • Assessment of Workforce Knowledge and Understanding of Current State

<ul style="list-style-type: none"> • Workforce Readiness Approach • Change Summary
The Updated Workforce Readiness Plan has been signed by the Agency Sponsor with an updated date.
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Update your agency-specific Workforce Readiness Plan through collaboration with key stakeholders and your agency CCN using the elements described above and supporting resources provided below with the data gathered from your End User Readiness Survey. Track progress in your Readiness Workplan Task Tracker. Upon completion, have the updated Workforce Readiness Plan officially approved and signed by your Agency Sponsor and any additional key stakeholders. Attach the updated Workforce Readiness Plan document in your Readiness Workplan Task Tracker. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%.

Table 2: Task Instructions

Instructions
1) Collaborate with your Change Champion Network and key stakeholders to update your agency's Workforce Readiness Plan.
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.
3) Have the updated Workforce Readiness Plan officially approved and signed by the Agency Sponsor and any additional key stakeholders.
4) Complete Task by August 2, 2024 .
5) When complete, attach the updated plan to the Readiness Workplan Task Tracker, then update the Agency Reported Task Progress column to 100% and save.
6) If you have questions, participate in or review the Thursday Task Talk on Thursday, June 20, 2024, or contact your Readiness Coordinator.

Supporting Materials and Resources:

- [Agency Implementation Roadmap](#)
- Agency Specific End User Readiness Survey Results
- [FL\[DS\]Project Management and Oversight resource page](#)
 - [Communication Plan](#)
 - [RACI Chart](#)
- [Readiness Workplan](#)
- [Task Instructions 503 – Create Workforce Readiness Plan](#)