Change Champion Network
Roles and Responsibilities

Florida PALM

Planning, Accounting, and Ledger Management

Table of Contents

Introduction

The Change Champion Network (CCN) Roles and Responsibilities provides guidance on CCN member roles, responsibilities, skills, and attributes needed to lead agencies through a successful business transformation and implementation of Florida PALM. An agency's transition to Florida PALM will take a significant amount of time and energy that no one person can undertake. The CCN is a collaborative, working group charged with leading the transformation across the agency's four critical operational elements: people, process, technology, and data. An active and effective CCN is crucial for the success of an agency. For reference, Figure 1 provides a graphical representation of the CCN framework, which is supported by the Florida PALM team, including Project leadership and the agency's dedicated Readiness Coordinator (RC).
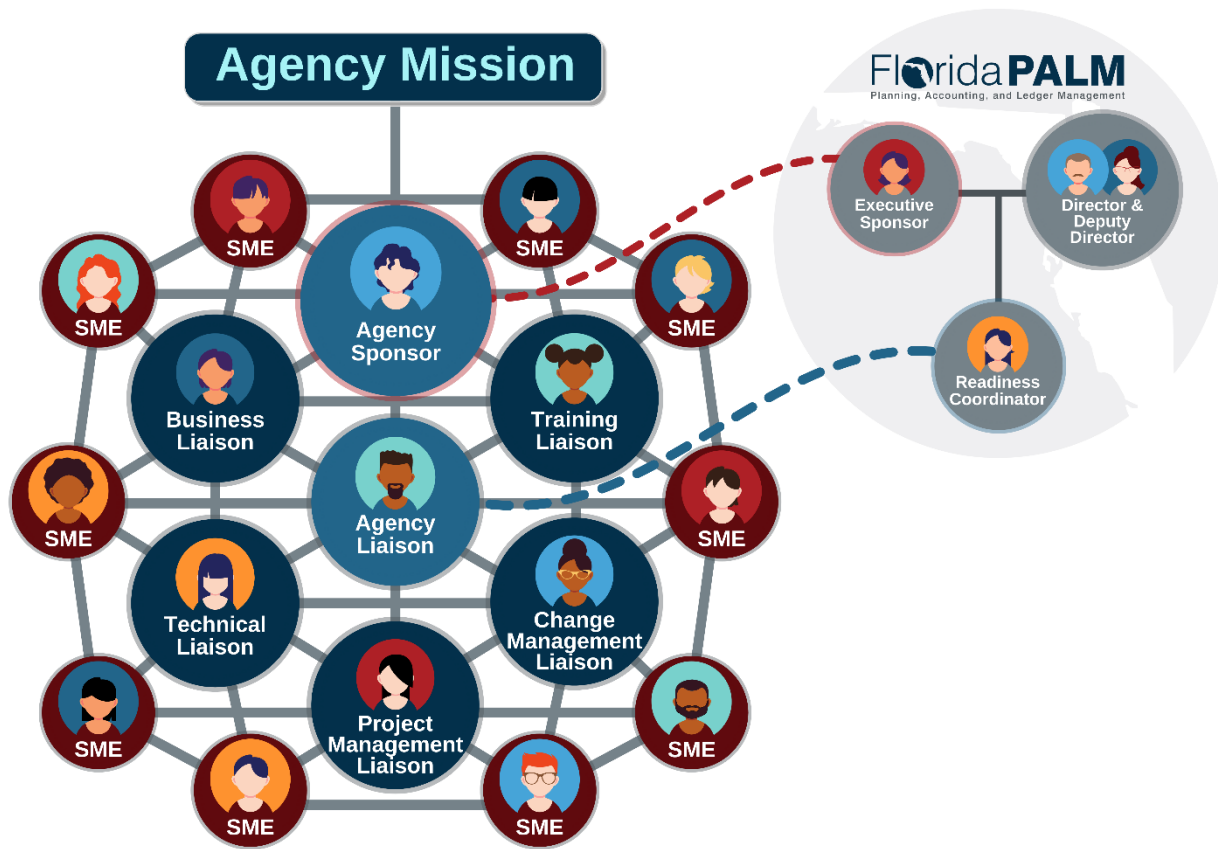

Figure 1: Change Champion Network Framework

Overview

The CCN is a group of experts whose purpose is to transform and ready the agency to implement Florida PALM. They are expected to be leaders, actively promote and support change and transformation efforts for the agency's critical operational elements. The CCN is expected to coordinate tasks required by the Project as well as develop agency specific readiness activities. It is critical that CCN liaisons are good communicators, able to manage conflicts, understand the agency's organization and feel comfortable reaching across division or office lines for resources and decision making.

The CCN is comprised of an Agency Sponsor, Liaisons, and Subject Matter Experts (SME), at a minimum. Due to the complexities of this business transformation, most agencies will require fully

dedicated (100% Project-focused) functional, technical and/or project management resources to be successful. Time commitment will be determined by both Project-driven tasks that agencies complete within identified time frames, as well as agency identified internal activities and transformation efforts. Liaisons should expect an increase in time commitment closer to go-live.

Florida PALM is a business transformation impacting each agency's four critical operational elements. Given the magnitude of change, each agency should have a fully formed team. Agencies who do not have a fully formed CCN team are at risk of not having the human resources needed to effectively ready their agency for Florida PALM. For agencies with impacted end users distributed across the state, the CCN should include representation from beyond the central finance and accounting office. Agencies are expected to obtain separate resources for each individual role. This may require identifying resources from various agency departments, not relying solely on finance and accounting or technical resources. Additionally, each agency should identify a primary and a backup for the Sponsor and Liaison roles. Having a backup for these roles helps mitigate any bottlenecks in communications and activity completion that might occur if the primary is unavailable (e.g., on sick leave, vacation) or no longer with the agency. It is the primary Liaisons' responsibility to engage and inform their backup of Project activities by sharing communications and materials provided by the Project.

The CCN is expected to meet at least once per month with their Project assigned RC to discuss agency readiness activities. All CCN roles are strongly encouraged to participate in these meetings to collectively represent the various agency stakeholders and be apprised of Project activities in a collaborative setting. In addition to these monthly Project-driven meetings, it is expected the CCN establish an internal meeting cadence with CCN members and agency stakeholders. These internal meetings are imperative to maintain a structured change management process and to discuss and plan for readiness activities, review task progress, and analyze agency responses for readiness tasks.

Agency Sponsor

The Agency Sponsor is a visible agency leader at the agency's Deputy Secretary or equivalent level, who supports the agency's transformation efforts, and who has authority within the agency to influence agency resource assignments and engagement. The Agency Sponsor leads the CCN itself and directs the change efforts within the agency. Key responsibilities include timely appointment of team members to fill each CCN role and ongoing evaluation of CCN membership; thoughtful enablement of internal agency changes required by the implementation (e.g., providing resources, approving changes); and active management of the agency's state of readiness (e.g., removing obstacles, making business process transformation decisions). Agency Sponsors also play a critical role in identifying, understanding, reporting, and monitoring agency risks, issues and mitigation plans. Simply put, the Agency Sponsor is responsible for ensuring their agency's overall successful transition to Florida PALM.

Expectations:

- Participate in meetings with Project Executive Sponsor and other Agency Sponsors
- Monitor agency risks, issues, and mitigation plans and communicate them to the Project
- Regularly monitor agency readiness progress and confirm agency readiness status
- Ensure agency readiness, including the remediation of the workforce structure, business processes, and technology
- Request, provide and assign appropriate resources as needed and remove obstacles to successfully complete transformation activities

- Clearly communicate authority, roles, responsibilities, and expectations to the CCN
- Actively distribute communications about Florida PALM and participate in communication events
- Promote and monitor participation in Project training, deployment, and transition activities
- Certify agency readiness prior to go-live

Agency Liaison

The Agency Liaison is the primary point of contact between the Project RC and the CCN. The Agency Liaison should be a good communicator, well-organized, a peer leader, and respected in the agency. They are expected to initiate and track the agency's completion of activities and tasks and report their status to the Agency Sponsor and the Project. The Agency Liaison is responsible for coordinating and leading the CCN.

Expectations:

- Champion the implementation of Florida PALM
- Lead the CCN, establishing a regular cadence of internal CCN meetings and monitoring change resistance
- Engage Agency Sponsor or other resources to remove obstacles or manage resistance
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Identify and assign agency resources to complete readiness activities
- Manage agency user access to agency and Project information in Smartsheet (this is a shared responsibility with the Project Management Liaison)
- Delegate RW tasks to the appropriate CCN Liaison(s) and SME(s), and hold those resources accountable for completing tasks in a timely manner
- Submit RW tasks on time and in the required format and completeness
- Provides visibility into status of readiness activities, including through RW task tracking
- Inform Agency Sponsor of readiness activities and agency progress
- Engage necessary stakeholders for CCN meetings and/or tasks
- Coordinate and engage with agency-wide stakeholders (i.e., current FLAIR and/or IW system/data users, current Florida PALM production users) to promote awareness and adoption
- Maintain open and frequent communication with the RC
- Coordinate and co-facilitate monthly Readiness Touchpoint meetings with agency CCN and RC
- Attend Florida PALM hosted meetings
- Promote and support agency momentum for transitioning to Florida PALM

Business Liaison

The Business Liaison is the coordinator of Project-related functional activities within the agency. The Business Liaison is expected to maintain an understanding of current business processes, identify changes and impacts to those processes, influence the adoption of new process changes, implement standardized business process changes, and update agency procedures. The Business Liaison understands planned Florida PALM functionality and coordinates the agency's review of the new business processes and opportunities to provide input or test the system.

Expectations:

- Champion the implementation of Florida PALM
- Understand agency business and data needs
- Develop understanding of Florida PALM functionality and compare to current business practices
- Provide recommendations to Agency Sponsor to support agency-specific business transformation planning and decision making
- Work closely with SMEs and the Technical Liaison to document and understand interfaces and data conversions that are needed to maintain business operations
- Assist Agency Liaison to identify agency resources to complete readiness activities
- Participate in internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Monitor for change resistance and partner with Agency Liaison or Agency Sponsor to help address or manage
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Participate in monthly Readiness Touchpoint meetings between the CCN and RC
- Attend Florida PALM hosted meetings, as applicable

Change Management Liaison

The Change Management Liaison has knowledge of and experience in implementing change initiatives. The Change Management Liaison identifies activities and messages to help the agency achieve organizational change readiness and leads internal initiatives within the agency for workforce transformation. They assist the Project in educating their agency using change management techniques and help build support for and promote the Project at their agency.

Expectations:

- Champion the implementation of Florida PALM
- Maintain awareness of Project-driven readiness activities and their change impacts to the agency's four critical operational elements
- Assist Agency Liaison to identify internally driven agency change impacts to agency's four critical operational elements
- Develop and employ strategies to minimize change resistance
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Create and manage an agency-specific communication plan
- Document change impacts and develop and implement an agency-specific plan for successful adoption of Florida PALM
- Maintain open and frequent communication with the Agency Liaison and CCN
- Participate in internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Participate in monthly Readiness Touchpoint meetings between the CCN and RC
- Attend Florida PALM hosted meetings, as applicable
- Promote and support agency momentum for change initiatives transitioning to Florida PALM

Project Management Liaison

The Project Management Liaison is knowledgeable of project management methodology, has experience managing large-scale or agency-wide projects, is a peer leader, and the manager of both Project- and internal agency-driven readiness tasks. The Project Management Liaison serves as support to the Agency Liaison and the CCN by monitoring, tracking and reporting the progress of readiness activities, RW tasks, and agency risks, issues and mitigation plans. They are expected to create and manage the agency's internal workplan to navigate through the Project established timeline and internally driven readiness activities and communicate status updates with CCN. The transition to Florida PALM is a complex project for all agencies. It is highly recommended that each agency has a Project Management Liaison that is fully dedicated to managing the transition to Florida PALM.

Expectations:

- Champion the implementation of Florida PALM
- Capture and track both Project- and internal agency-driven readiness activities and maintain awareness of task progress and due dates
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Assist Agency Liaison to identify agency-wide stakeholders and resources to manage Project-driven readiness tasks and internal readiness activities within the agency
- Manage agency user access to agency and Project information in Smartsheet (this is a shared responsibility with the Agency Liaison)
- Maintain open and frequent communication with the Agency Liaison and CCN
- Participate in internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Participate in monthly Readiness Touchpoint meetings between the CCN and RC
- Attend Florida PALM hosted meetings, as applicable
- Sustain agency momentum for Project-driven readiness tasks and internal readiness activities with transitioning to Florida PALM

Technical Liaison

The Technical Liaison maintains an understanding of current agency technology, the planned technical functions of Florida PALM, and is the point of contact for technical activities including security, interface and conversion development, and testing. The Technical Liaison is expected to coordinate and conduct technical site preparation activities, including the agency's ability to connect to Florida PALM and set up the infrastructure for interface transmission, as applicable.

Expectations:

- Champion the implementation of Florida PALM
- Understand current technical needs for agency business operations
- Ability to understand Florida PALM technical functions and compare to current business Operations
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Provide recommendations to Agency Sponsor to support agency business system remediation planning and decision making

- Work closely with the Business Liaison and data owners to document and understand the agency business systems and agency data that needs to be interfaced with, or converted to, Florida PALM
- Support Agency Liaison and CCN with Project-driven technology related readiness activities and identify resources to complete them
- Assist Agency Liaison and CCN by identifying internal technology related readiness or change impacts to technology and the approach and process to manage them
- Lead efforts to retire or remediate agency business systems, build connections to Florida PALM, and prepare data for conversion
- Participate in internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Participate in monthly Readiness Touchpoint meetings between the CCN and RC
- Attend Florida PALM hosted meetings, as applicable
- Promote and support agency momentum for technology changes and remediation efforts with transitioning to Florida PALM

Training Liaison

The Training Liaison coordinates and supports Florida PALM training activities and is expected to implement the Project's training program and their agency's specific training program. The Training Liaison is responsible for supporting the training of agency end users by assessing their knowledge, skills, and abilities (KSAs) and developing and providing agency-specific training to address any KSA gaps throughout the lifecycle of the Project, including now, during design and build activities, and during User Acceptance Testing (UAT). The Training Liaison must also provide administrative, logistical support of delivered Florida PALM training and document end user training completion. Training Liaisons should work with current FLAIR users to confirm or enhance their understanding of current agency business processes, including what business function they are doing, why the perform the function, and where the function fits into the process.

Expectations:

- Champion the implementation of Florida PALM
- Work with internal program or administrative offices to assess the KSAs of current end users and identify any gaps in KSAs for Florida PALM
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions
- Develop and provide agency-specific end user training to address gaps in KSAs
- Create agency specific training materials from Project published materials, the Knowledge Center or completed RW tasks (i.e., creating an agency specific Chart of Accounts crosswalk using completed agency configuration workbooks)
- Track agency participation in delivered Florida PALM end user training and agency-specific training
- Validate end users' understanding of their current job by business function
- Work with internal program or administrative offices to strengthen current FLAIR users' skills and understanding of business functions
- Work with Agency Liaison and CCN with Project-driven training activities and identify resources and internal impacts and processes to complete them
- Participate in internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Participate in monthly Readiness Touchpoint meetings between the CCN and RC

- Attend Florida PALM hosted meetings, as applicable
- Promote and support agency momentum for completing training on business process changes with transitioning to Florida PALM

Subject Matter Expert

The Subject Matter Expert is a member of an agency CCN that is proficient in a business process and/or technical workstream and is not currently assigned a CCN Liaison role. SMEs may be located at the central office or may be located in a field or division office across the state. During implementation, SMEs are expected to provide their expertise to understanding agency current state activities, develop an understanding of Florida PALM functionality, be the first participants in UAT and serve as a mentor and internal support for end users after go-live. SMEs' time commitment will depend on the support needed from the rest of the CCN but is expected to increase during testing, training, go-live readiness activities and post-implementation support.

Expectations:

- Assist the CCN with the completion of readiness activities and RW tasks, as needed
- Assist with the identification and end user adoption of business process change impacts
- Assist with development and delivery of agency-specific end user trainings
- Contribute to agency UAT efforts by:
  - o supporting UAT planning (e.g., user stories/script development, agency-specific materials development),
  - o participating in early rounds of UAT testing (e.g., prior to end users), and
  - o assisting end users during the UAT process (e.g., being a resource for questions)
- Prepare to support agency end users upon go-live
- Attend Project-hosted workgroups, workshops, and other implementation activities
- Participate in external and internal CCN meetings and engage with other agency stakeholders and liaison roles, as needed
- Support agency momentum for completing Florida PALM transition activities
- Report agency-specific Florida PALM risks and issues to Agency Sponsor or CCN and support mitigation strategies or resolutions