Below you will find a screenshot of the FWC Gap Analysis Survey done in SharePoint:

Name

BA Burns, Amber ✕

Position Number

Division

Start typing in...

Region

Start typing in...

Rate the following from 1 (being the lowest) to 5 (being the highest).

1. Rate your level of understanding of the FLAIR Chart of Accounts (COA) components. ⓘ

○ 1   ○ 2   ○ 3   ○ 4   ○ 5

2. Rate your level of understanding of the new Florida PALM Chart of Accounts (COA) Structure. ⓘ

○ 1   ○ 2   ○ 3   ○ 4   ○ 5   ○ N/A

3. Rate your knowledge of basic accounting principles. (e.g., GAAP, Financial Statement Reporting)

○ 1   ○ 2   ○ 3   ○ 4   ○ 5

4. Choose your experience level with Microsoft Excel.

○ Beginner   ○ Intermediate   ○ Advanced

5. Select "Yes" for all duties that you perform as part of your current position.

Submit Invoices for payment that are not contract, PCard, travel or purchase order related	Prepare/Review Legislative Budget Requests	Establish budget allocations for a Division or Office
◉ No	◉ No	◉ No
Monitor/Manage spending/budgets	Federal or non-federal grant related spending, monitoring, billing or reporting	Manage Contracts
◉ No	◉ No	◉ No
Purchase of equipment with value greater than $5,000	Monitor and/or maintain equipment with value greater than $5,000	Process payments to FWC from customers
◉ No	◉ No	◉ No
Manage agreements with other Florida State Agencies (including payments to or from other state agencies)	Request to establish new account coding for tracking expenditures or revenues	Use data that is obtained from any of the following sources: WebFocus, MRE, Information Warehouse, FLINT
◉ No	◉ No	◉ No
Manage financial data (i.e., propose/request expenditure moves, reconcile data to available reports)	Participate in activities related to fiscal year end closing	Manage, monitor or maintain funding information for FTE or OPS positions
◉ No	◉ No	◉ No

6. Are you familiar with the Florida PALM Business processes connected to the duties of your current position as selected in Question 5?

◉ No

7. How do you expect Florida PALM to impact you in your current role?

8. When is the planned Go Live Date for Florida PALM?

9. How can the FWC Change Champion Network (CCN) improve your level of interest in the Florida PALM project?

This is the Word document version of the FWC Gap Analysis Survey.

(Single Line of text) Name:
(Choice) Division:
(Choice) Region:
(Eight Digit Number) Position Number:

1. FLAIR COA: Rate your level of understanding of the FLAIR Chart of Accounts (COA) components. (Do you know the use for, and definitions of, the following: Organization Code, Category, Fund, Budget Entity, Object Code, Project ID, Grant Number, Contract Number, General Ledger Code?)
    Rate 1-5

2. Rate your level of understanding of the new Florida PALM Chart of Accounts (COA) Structure. Choose N/A if you have not been exposed to the Florida PALM COA.
    Rate 1-5 or N/A

3. Rate your knowledge of basic accounting principles. (e.g., GAAP, Financial Statement Reporting)
    Rate 1-5

4. Choose your experience level with Microsoft Excel.
    Choice (Beginner, Intermediate, Advanced)

5. **Select "Yes" for all duties that you perform as part of your current position.** *Choose all that apply.*
    [Based on your responses, we will be creating additional resources or surveys surrounding these topics].

o   Submit Invoices for payment that are **not** contract, PCard, travel or purchase order related *(Invoices)*
o   Prepare/Review Legislative Budget Requests *(LBR)*
o   Establish budget allocations for a Division or Office *(Budget1)*
o   Monitor/Manage spending/budgets *(Budget2)*
o   Federal or non-federal grant related spending, monitoring, billing or reporting *(Grants)*
o   Manage Contracts *(Contracts)*
o   Purchase of equipment with value greater than $5,000 *(Assets1)*
o   Monitor and/or maintain equipment with value greater than $5,000 *(Assets2)*
o   Process payments to FWC from customers *(Revenue)*
o   Manage agreements with other Florida State Agencies (including payments to or from other state agencies) *(Interunit)*
o   Request to establish new account coding for tracking expenditures or revenues *(COA)*
o   Use data that is obtained from any of the following sources: WebFocus, MRE, Information Warehouse, FLINT *(Data)*
o   Manage financial data (i.e., propose/request expenditure moves, reconcile data to available reports) *(Financial Management)*
o   Participate in activities related to fiscal year end closing *(Closing)*
o   Manage, monitor or maintain funding information for FTE or OPS positions *(Payroll)*

6.   **(Yes/No)** Are you familiar with the Florida PALM Business processes connected to the duties of your current position as selected in Question 5?

7. **(Comment)** How do you expect Florida PALM to impact you in your current role?

8. **Choice (January 1, 2026, July 1, 2026, January 1, 2027, July 1, 2027,)** When is the planned Go Live Date for Florida PALM?

9. **(Comment)** How can the FWC Change Champion Network (CCN) improve your level of interest in the Florida PALM project?

For more information about the Florida PALM Project visit https://myfloridacfo.com/floridapalm.

Do you have questions or suggestions? Contact an FWC CCN member or submit them to FL PALM - Florida PALM @ FWC Comments - All Items (sharepoint.com)

FWC Change Champion Network (CCN) Members:

Project Sponsor: Jessica Crawford
Agency Liaison/Project Manager: Laurie Kershaw
Change Management Liaison: Sarah Barrett
Advisory Council Member/Business Liaison: Amber Burns
Technical Liaison: Mike Turner
Training Liaison: Laura Jerome
Executive Steering Committee Representative: Hunter Jones