

## Task Instructions

**Task ID:** 568

**Task Name:** *Create Training Plan for Agency Managed End User Training*

**Task Start Date:** *December 9, 2024*

**Task Due Date:** *May 30, 2025*

**Project Impact:** *N/A*

## Task Description

Review planned Florida PALM end user training topics and activities to support identification and planning of agency specific end user training topics. Develop and submit a training plan for agency managed end user training.

## Task Overview

The Training Plan for Agency Managed End User Training is designed to guide agencies in the effective planning and execution of end user training programs tailored to their unique agency needs. As described in the [Training Approach](#), all agencies are expected to determine the best way to communicate and provide agency-specific training. This plan focuses on helping agencies share, review, and align their training efforts with the planned Florida PALM Topics and Activities.

Florida PALM provided training topics will focus on how to perform activities within the functionality of the system. The completion of RW Task 560 – Submit Change Analysis Tool, due January 31, 2025, will help you identify changes impacting your agency's people, processes, technology and data. Based on the changes, you will be able to identify any agency specific areas where training will be needed to establish a collaborative framework for training development, ensuring your agency is equipped to:

1. Capture and align Florida PALM processes with agency business processes.
2. Customize training to address specific agency roles, values, systems, and workflows.
3. Meet implementation timelines while maintaining ongoing operations.

By the end of this process, agencies will develop and submit a comprehensive training plan that includes a strategy for agency-managed and agency specific end user training. This plan will serve as a roadmap for ensuring that staff have access and are fully prepared to participate in Florida PALM agency managed and agency specific training.

## Key Considerations

When completing your Training Plan, consider the following critical activities required to prepare for and execute training.

- **Scheduling:** Organizing dates, times, and locations for training sessions.
- **Logistics:** Coordinating resources such as trainers, venues, materials, and technology needed for the training.
- **Participant Management:** Handling enrollments, attendance tracking, and communication with learners.
- **Content Delivery:** Managing how the training will be presented, including choosing formats (in-person, online, hybrid) and teaching methods (lectures, group work, e-learning).

- **Assessment and Evaluation:** Carrying out methods for evaluating learners' progress, such as quizzes, tests, or performance assessments.
- **Feedback Collection:** Gathering participant feedback on the effectiveness of the training for any future improvements, if necessary.

## Task Elements

This task consists of two elements.

1. Review the Florida PALM Topics and Activities list
2. Complete and submit Task 568 Create Agency Managed Training Plan

### *Review the Florida PALM Topics and Activities List*

The Florida PALM Topics and Activities list serves as the foundation for end-user training development. It is structured to provide agencies with a detailed guide to topics, activities, and learning objectives. Below is an outline of the critical columns within the listing:

- **Business Process Grouping:** Financial management processes used today are categorized into thirteen business process groupings. These groupings are used to organize and communicate the design of Florida PALM for the state.
- **Process Module:** The Florida PALM module that will support the activity is listed where applicable.
- **Topic Name:** Each topic is labeled to define the scope and focus of the subject / activity. The topic name provides an at-a-glance understanding of the content, helping agencies quickly identify its significance to their operations.
- **Activity Name:** Activities within each topic are the different capabilities under the umbrella topic and represents a function completed using Florida PALM.
- **Business Process Model:** The one or more process or subprocess associated with the topic and activity combination.
- **Role(s):** The Florida PALM security role that has some capability or responsibility for or within the activity. These include agency and enterprise roles.
- **System / Other:** Where applicable, the Florida PALM security roles that are not assigned to individuals but that perform a function within the system in support of the activity (e.g., runs various automated processes, reports, interfaces), or individuals or entities that perform functions outside of the system in support of the activity.
- **Related Item (RICEFW Items):** Any reports, interfaces, forms, and workflows that support the related business process model.
- **Entity:** Indicator of the entity (e.g., agency, DFS) to whom the associated role is assigned.

**NOTE:** *It is important to note that the Topics and Activities listing is a living document. As we move forward with materials development, updates may be made to reflect refinements along the way. Therefore, the document should be reviewed on a regular basis to determine if any updates to agency managed training topics are necessary.*

### ***Complete Task 568 Create Agency Managed Training Plan***

Once your agency has reviewed the topics and activities, you will complete your agency's training plan. A template has been provided to use when you develop your training plan. However, you can use your own format when creating your document. If you choose to use your own format, you must ensure the document includes:

- **Overview** – Describe what this document means to your agency and its readiness efforts for Florida PALM.
- **Roles and Responsibilities** – Describe the internal and external people, teams, or resources needed to design, deliver, and monitor your agency training.
- **Training Planning and Execution** – Include the following elements to help your agency plan and execute training for its end users:
  - *Audience and Participants* – Describe for whom you will provide training or learning opportunities.
  - *Logistics* – Describe your approach, timeline, and activities for providing training.
  - *Curriculum and Materials* – Describe the approach, timeline, and activities for creating the training content.
  - *Timeline* – Describe the planned timing for delivery of training and end user learning.
  - *Tracking and Measurement* – Describe the approach and methodology for monitoring and reporting training progress.

#### ***Overview***

In this section, provide a clear summary of your Agency Training Plan. The overview should include:

- **Purpose and Objectives:** Explain the goals of your training program, including how it will prepare end users for their roles in supporting Florida PALM processes.
- **Scope:** Outline the areas or functions the training will cover and any specific considerations unique to your agency.
- **Alignment:** Describe how your agency's training plan aligns with Florida PALM's statewide training objectives and timelines.

#### ***Roles and Responsibilities***

In this section, list and describe the critical roles and responsibilities to execute agency specific training.

- **Training Liaison (Primary and Back-Up):** These individuals will act as points of contact with the Florida PALM Team.
- **Internal Trainers:** Staff responsible for delivering agency-specific training.
- **Support:** IT and logistical support staff.
- **End User:** These individuals will attend appropriate training based on their role.

#### ***Training Planning and Execution***

This section details your agency's approach to delivering end user training by addressing the following elements:

- **Training Participants:** Describe how you will identify end users to attend specific training sessions.
- **Training Logistics:** Provide details on how training schedules, registration, locations (virtual or in-person), and necessary equipment will be identified.
- **Training Curriculum:** Provide details on how you will identify agency specific training curriculum to be developed.
- **Training Materials:** Specify what types of materials will be used (e.g., job aids, videos, reference guides, e-learning modules).
- **Training Timeline:** Include information on the expected timeline to develop and deliver agency specific training.
- **Tracking Training Progress:** Describe how you will monitor training completion or attendance to ensure all required audiences or participants complete training. Monitoring the completion of training will provide information to confirm agency end users have completed training and are ready to transition to Florida PALM and may be used as part of your [Agency Readiness Reporting](#) and Agency Readiness Certification.
- **Training Coordination:** Describe how the agency will collaborate internally to develop and deliver training.
- **Training Measurement:** Describe how your agency will measure, track, and report progress toward meeting its agency specific training objectives.

## How will agencies use this information?

You will use the information gathered in your Training Plan to prepare for and complete the following Readiness Workplan Tasks:

- RW Task 604 – Create Agency Specific Training
- RW Task 625 – Conduct Agency Specific Training

Beyond reviewing the Florida PALM Topics and Activities listing to identify Project delivered training topics, use information identified as part of the work associated with RW Task 560 – Submit Change Analysis Tool to associate any changes impacting the agency. From this, you will be able to identify any agency-specific training topics that will need to be developed.

Training is a critical resource for your agency's readiness for Florida PALM. Uploading your completed Agency Training Plan to your Readiness Workplan Task Tracker will allow the Florida PALM Project Team access to information to gain insights into your agency's unique training efforts. Collectively, readiness tasks provide the Florida PALM Project Team insights that allow us to better assist each agency.

Table 1: Task Completion Rubric

Task Completion Rubric
Agency's Training Plan is attached to Task 568 row within your Readiness Workplan Task Tracker.
<p>Drafts within the following sections of your Training Plan have been completed:</p> <ul style="list-style-type: none"> <li>• <b>Overview</b> - Describe what this document means to your agency and its readiness efforts for Florida PALM.</li> <li>• <b>Roles and Responsibilities</b> - Describe the internal and external people, teams, or resources needed to design, deliver, and monitor your agency training.</li> <li>• <b>Training Planning and Execution</b> – Include the following elements to help your agency plan and execute training for its end users: <ul style="list-style-type: none"> <li>○ <i>Audience and Participants</i> – Describe for whom you will provide training or learning opportunities.</li> <li>○ <i>Logistics</i> – Describe your approach, timeline, and activities for providing training.</li> <li>○ <i>Curriculum and Materials</i> – Describe the approach, timeline, and activities for creating the training content.</li> <li>○ <i>Timeline</i> – Describe the planned timing for delivery of training and end user learning.</li> <li>○ <i>Tracking and Measurement</i> – Describe the approach and methodology for monitoring and reporting training progress.</li> </ul> </li> </ul>
The Task Tracker has been marked as 100% complete for this task.

## Task Instructions

Complete your Training Plan through collaboration with key stakeholders and your agency CCN using the elements described above. Track progress in your Readiness Workplan Task Tracker. Upon completion, attach the Training Plan document in your Readiness Workplan Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 1 above.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Collaborate with your Change Champion Network and key stakeholders to create your agency's Training Plan for Agency Managed End User Training.
2) 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.
3) Complete task by <b>May 30, 2025</b> .
4) When complete, attach the Training Plan to the Readiness Workplan Task Tracker, then update the Agency Reported Task Progress column to 100% and save.
5) If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

## Supporting Materials & Resources:

- [Florida PALM Topics and Activities](#)
- [Training Approach](#)
- [Training Plan Template](#)