Task Instructions

Task ID: 503
Task Name: *Create Workforce Readiness Plan*
Task Start Date: *October 16, 2023*
Task Due Date: *December 15, 2023*

Task Description

Create a plan to identify and engage impacted stakeholders within your agency workforce including a communication strategy, knowledge transfer needs, and workforce attrition planning.

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.

This task is the final 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 (Released 10/09/2023)
- ➢ 502 – Create Agency Specific Risks and Issues Management Plan (Released 10/09/2023)
- ➢ **503 – Create Workforce Readiness Plan**

Creating the workforce readiness plan is an essential project planning process an agency must complete to analyze its workforce and determine steps needed to meet current and future staff needs.

The objective of such a plan is to provide agencies with 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. The plan aims to promote seamless knowledge transfer, maintain effective communication, and address workforce attrition concerns.

Elements of a Workforce Readiness Plan

Creating a workforce readiness plan involves several critical elements to ensure that an organization has the right people, with the right skills, to effectively achieve its goals. The creation and ongoing maintenance of a Workforce Readiness Plan should include the following key activities iteratively performed throughout your agency's implementation and readiness journey.

1. **Identify Impacted Workforce**
   Through your agency's current state analysis efforts, you have been building an understanding and awareness of your agency's functional and technical needs. At this phase of your analysis, for impacts to people and processes, it is critical that you identify and understand the current state of your workforce. Future Readiness Workplan (RW) Task 512 will build on your effort to identify impacted staff by requiring agencies to provide a list of anticipated Florida PALM end users.

   Consider your current workforce's roles in FLAIR (Central, Departmental, PYRL, RDS/NASSAM, and IW/MRE/Webfocus) and internal agency business systems. Identify who is accessing the system(s) or data within these systems and their role in using or supporting the systems. In addition to reviewing your FLAIR and RACF users, review all roles identified in your Current State Analysis inventories (RW Tasks 324 – 328). Some questions to consider are:

   - Who is processing and/or approving transactions?
   - Who is writing, using, or receiving reports?
   - Who is providing functional design or technical support of agency business systems?

   Understanding your workforce involves collecting and / or categorizing those impacted based on:
   - Level of impact
     o 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.
     o 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.
   - Location of staff
     o Consider your agency stakeholders and workforce in districts, regions, divisions, and field offices.
     o Location of staff may impact future training plans, communication plans, and engagement approach.
   - Known or anticipated vacancies
     o Identify potential attrition impacts resulting from the departure of employees from the agency for any reason (voluntary or involuntary), including resignation, termination, or retirement.
     o Consider recent agency retention/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.

   Mapping tools, such as a Stakeholder Template or RACI chart, are tools used to support your agency's identification and categorization of your workforce.

2. **Assess Workforce Knowledge and Understanding**
   Assessing your agency workforce starts with establishing a baseline of your workforce's knowledge, competencies and understanding of current agency business processes and comparing that with the level necessary to meet their current expectations (i.e., how well do they know the 'what' and 'why' of how they perform their jobs today). Your assessment should create an awareness of gaps in knowledge or skills and include documented areas for improvement within your workforce. Some questions to consider are:

- Do they know why they do what they do in business terms, not FLAIR terms (e.g., TRs)?
- Do they know where they fit into the agency's business process (e.g., where does the information go when they have completed their task)?
- Do they know how to use modern technology like web browsers?

3. **Prepare Workforce Readiness Approach**

   Your workforce readiness approach provides the initial framework you will use 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, responsibilities, and timelines for the approach to meet workforce needs.

   - Key activities can include:
     - Create learning and development activities to address any gaps identified in the workforce knowledge and understanding assessment. Use your agency's Current State Business Processes documentation (RW Task 328) as a resource to develop learning materials. Is your agency reviewing the Financial Wave and Payroll Wave Business Process Design Models, released by segment, to identify agency objectives for future state business processes? It is never too early to start discussing changes that will be coming.
     - Create activities to address known or anticipated workforce vacancies. Consider alternate recruitment methods like job fairs and career advancement practices. Consider opportunities for position overlap in critical business process areas.
     - Create a detailed communication plan. The plan should include your agency's approach to engage 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, 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.
       - Who needs to know about these changes?
       - How often do you need to communicate with these groups?
       - What is the best way to communicate the message(s)?
   - The 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.
   - The timeline or schedule 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.

Activities and responsibilities from your workforce readiness plan should be included in your Agency Specific Implementation Schedule (current RW Task 501).

How will agencies use this information?

Creating a workforce readiness plan for your agency, as part of your transformation planning for Florida PALM, can help your agency:

➢ Identify staffing needs and skillsets across multiple levels within your agency, supporting both short- and long-term goals for workforce alignment.
➢ Identify and align your agency workforce with business plans to target and prioritize skill requirements and transition strategies.
➢ Support organizational change efforts and create a readiness plan for your future workforce.

Agencies should report any agency-specific readiness activities or identified risks and issues related to their plan in the Bimonthly Agency Readiness Status Reports. The plans are expected to be reviewed and updated over time. Future RW tasks will require agencies to review and update their plan as we progress along the implementation timeline.

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 allows us to better assist each agency.

Task Instructions

Draft or 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. Track progress in your Readiness Workplan Task Tracker. Upon completion, have the Workforce Readiness Plan officially approved and signed by your Agency Sponsor and key stakeholders. Attach the Workforce Readiness Plan document in their Readiness Workplan Task Tracker and use as a repository for agency project management documents. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%.

Instructions
1) *Collaborate with your Change Champion Network and key stakeholders to draft or update a 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 completed Workforce Readiness Plan officially approved and signed by key stakeholders and Agency Sponsors.*
4) *When complete, update the Readiness Workplan Task Tracker, Agency Reported Task Progress column, to 100% and save.*
5) *If you have questions, participate in or review the Tuesday Task Talk on Tuesday, October 17, 2023, or contact your Readiness Coordinator.*

Supporting Materials and Resources:

- Readiness Workplan
- Agency Implementation Roadmap
- FL[DS]Project Management and Oversight resource page
  - Communication Plan
  - RACI Chart