Florida PALM
Planning, Accounting, and Ledger Management
Change Champion Network Kickoff Agenda

- Welcome
- Project Overview
- Change Champion Network Overview
- Next Steps
- Q&A
WELCOME
Welcome
Pilot Agencies

Agencies making a full transition to Florida PALM during Pilot:
Welcome Wave Organizations

Organizations transitioning to Florida PALM for Central FLAIR and CMS functionality during Pilot:
Welcome
FFMIS Partners

- Florida Financial Management Information Systems (FFMIS) Partners supporting the State in transitioning to Florida PALM
  - CMS
  - LAS/PBS
  - FLAIR
  - MFMP
  - People First
PROJECT OVERVIEW
Project Overview
Project Vision and Goals

Vision
Implement a statewide accounting system that:
• Enforces standardization;
• Acts as a scalable foundation to evolve as business needs change; and
• Positions Florida for future innovation as it considers a true enterprise-wide solution.

Goals
• Reduce the State’s risk exposure;
• Improve state and agency specific decision making;
• Improve the State’s financial management capabilities; and
• Improve staff productivity, reduce operational complexity, and increase internal controls.
Project Overview

Wave Timeline

We are Here!
Project Overview
Pilot Implementation Activities

- How might organizations prepare for these activities?
- How might organizations complete these activities?
- How might this information be distributed within organizations?
Change Champion Network Overview

Change Champion Network Approach

VOICE
You are the voice and representatives of your agencies

PARTNERSHIP
You are not alone!

COLLABORATION
We will work together

COMMUNICATIONS
Continuous conversation
Change Champion Network Overview
Change Champion Network (CCN)

Organization Roles
- Agency Sponsor
- Agency Liaison
- Business Liaison
- Change Management Liaison
- Technical Liaison
- Training Liaison
- Super Users

Florida PALM Roles
- Project Sponsor
- Project Director
- Readiness Coordinator
Change Champion Network Overview
Agency Sponsor Role

- High level of visibility within the organization and with other State of Florida Agency Sponsors;
- Positive support of the Solution and implementation;
- Ability to approve the business and technical changes required by the implementation; and
- Ability to allocate resources to:
  - Actively engage the organization in Project readiness;
  - Actively distribute Project communications and participate in communication events; and
  - Promote and monitor participation in Project training, deployment, and transition activities.
Change Champion Network Overview

Agency Liaison Role

- Champions the Solution and implementation;
- Peer leader and respected within the organization;
- Strong communication and presentation skills;
- Strong administrative coordination skills;
- General understanding of the organization as a whole;
- Availability to attend Change Champion Network meetings;
- Ability to manage change resistance; and
- Knowledge and/or experience implementing change initiatives.
Change Champion Network Overview

Business Liaison Role

- Peer leader within the organization;
- Experience at the organization with awareness in all functional area(s);
- Familiar with the business needs including:
  - End to end business processes, and
  - FLAIR and CMS configurations;
- Ability to facilitate updates to the organization’s business processes by business process owners;
- Strong communication and presentation skills; and
- Availability to attend Change Champion Network meetings.
Change Champion Network Overview

Technical Liaison Role

- Peer leader within the organization;
- Familiar with the organization’s technical needs including:
  - Business Systems, and
  - Interfaces with FLAIR and CMS and data needs;
- Strong communication and presentation skills;
- General understanding of the organization as a whole; and
- Availability to attend Change Champion Network meetings.
Change Champion Network Overview

Change Management Liaison Role

- Champions the Solution and implementation;
- Peer leader within the organization;
- Strong communication and presentation skills; and
- Availability to attend Change Champion Network meetings.
Change Champion Network Overview
Training Liaison Role

- Peer leader within the organization;
- Ability to assign resources from the organization as trainers;
- Ability to implement the organization’s training program;
- Strong communication and presentation skills;
- General understanding of the organization as a whole; and
- Availability to attend Change Champion Network meetings
Change Champion Network Overview
Florida PALM Readiness Coordinators (RCs)

Teill Roberson
Kathryn Harrell
Julian Gotreaux
Kimberly Kemp

LAS/PBS
# Change Champion Network Overview

## Planned Meetings

<table>
<thead>
<tr>
<th>Sponsor Briefings</th>
<th>Touchpoints</th>
<th>Townhalls</th>
<th>Workshops/Workgroups</th>
</tr>
</thead>
</table>
| • Review readiness status  
• Discuss needs or concerns  
• Plan for upcoming readiness tasks | • Review status  
• Update Master Readiness Workplan (MRW)  
• Update Open Items Tracker (AOT) | • Provide Project updates  
• Facilitate engagement  
• Support peer-to-peer networks | • Communicate and collaborate on specific Solution activities |

|  | Agency Sponsor  
• Project Director  
• Project Sponsor | Agency Liaison  
• Florida PALM Readiness Coordinator | Change Champion Network Liaisons  
• Florida PALM Organizational Readiness Team | Change Champion Network Liaisons  
• Super Users  
• Florida PALM Project Team Members |

- **May 21, 2019**
The Project will create a workbook for tracking readiness activities.

The Readiness Workbook will include:

- **Master Readiness Workplan** – Baseline set of tasks to help organizations transition to Florida PALM.
- **Open Items Tracker** – Organization-specific activities that need to be resolved or mitigated.
<table>
<thead>
<tr>
<th>Date released/re-released</th>
<th>Applicable Organization/Audience</th>
<th>Task ID</th>
<th>Task Name</th>
<th>Task Description</th>
<th>Task Supporting Documents</th>
<th>Planned Task Start Date</th>
<th>Planned Task End Date</th>
</tr>
</thead>
</table>
| 5/13/2019                | Pilot, FFMIS                     | RDNS01  | Attend the Change Champion Network Kickoff | Attend the Change Champion Network Kickoff to learn about the Change Champion Network roles and responsibilities, expectations, and support tools. | Meeting invitation  
- Presentation Materials | 5/21/2019               | 5/21/2019             |
The Project will communicate MRW tasks through:
- Email, task instructions
- Discussion, Touchpoint meetings

The information for each task includes:
- Task descriptions
- Step-by-step instructions on how to complete the task
- Expected due dates
# Change Champion Network Overview

## Open Items Tracker

<table>
<thead>
<tr>
<th>Organization</th>
<th>Item ID</th>
<th>Item Description</th>
<th>Status</th>
<th>MRW Task ID</th>
<th>Open Date</th>
<th>Due Date</th>
<th>Progress</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization that the open item belongs to</td>
<td></td>
<td></td>
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<tr>
<td>Brief description of the task</td>
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<tr>
<td>MRW task ID that the item is associated with</td>
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<tr>
<td>Date that the item should be dispositioned by</td>
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<td></td>
<td></td>
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<tr>
<td>An explanation of how the item was dispositioned</td>
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<td></td>
<td></td>
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</tbody>
</table>

- **Organization**: The organization that the open item belongs to.
- **Item ID**: Unique ID assigned to each task.
- **Item Description**: Brief description of the task.
- **Status**: Point in time status.
- **MRW Task ID**: MRW task ID that the item is associated with.
- **Open Date**: Date that the item was identified on.
- **Due Date**: Date that the item should be dispositioned by.
- **Progress**: A timeline of the actions taken as progress is made.
- **Resolution**: An explanation of how the item was dispositioned.
# Change Champion Network Overview

## Readiness Scorecard

<table>
<thead>
<tr>
<th>Readiness Category</th>
<th>Readiness Activities</th>
<th>Status</th>
<th>Areas of Concern</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsorship (SPON)</td>
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<tr>
<td>Communications (COMM)</td>
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<tr>
<td>Functional (FUNC)</td>
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<tr>
<td>Readiness (RDNS)</td>
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<tr>
<td>Training (TRNG)</td>
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<tr>
<td>Technical (TECH)</td>
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</tbody>
</table>

**Overall Status**

- **The primary categories that each activity belongs to**
- **Summary of MRW activities for each readiness category**
- **Reason for a status of “at risk” or “past due”**
- **Color representation of overall status of each readiness category (Green, Yellow, or Red)**
Helps the Florida PALM Team understand the Change Champion Network and end users' readiness to transition to Florida PALM

SurveyMonkey®

Change Champion Network
Potential Florida PALM end users

3x per Wave
Change Champion Network Overview

Communication Materials

- Visit the Florida PALM Project Website
- Read and Share the Florida PALM Project Emails
- Display Florida PALM Project Posters
Change Champion Network Overview
Change Champion Network Website Page

https://www.myfloridacfo.com/floridapalm/agency/change-champion-network
Change Champion Network Overview

Change Champion Network Considerations

- MANAGE READINESS ACTIVITIES?
- CREATE A COLLABORATIVE WORKSPACE?
- COORDINATE REGULAR CHECK-INS?
- FACILITATE CONTINUOUS COMMUNICATION?
Next Steps

- RCs will be reaching out to schedule Touchpoints
- Watch for the Readiness Survey
- Begin reviewing MRW, once distributed
Questions
CONTACT INFORMATION

CONTACT US
FloridaPALM@myfloridacfo.com

PROJECT WEBSITE
www.myfloridacfo.com/FLORIDAPALM/