FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES

REGULATORY LIFECYCLE MANAGEMENT SYSTEM – PRE-DESIGN, DEVELOPMENT, AND IMPLEMENTATION PROJECT

D5B-C Workforce Training and Transition Plan

Date: 3/17/2016
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Quality Review

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<tr>
<td>Jennifer Pang</td>
<td>North Highland QA</td>
<td>03/09/2016</td>
</tr>
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SECTION 1 INTRODUCTION

North Highland has been asked to assess the Regulatory Lifecycle Management System (RLMS) Project Workforce Transition needs and to create a strategy that facilitates change. The Workforce Training and Transition Plan (Deliverable D5B-C) is the blueprint for successfully delivering against this strategy. The two main components – the Workforce Training Plan and the Workforce Transition Plan – encompass the activities that must be carried out to ensure employees have the knowledge, skills and abilities they need to operate successfully in the new work environment once the RLMS is in place, and the actions FDACS should take to transition its workforce to the new way of conducting and supporting regulatory lifecycle activities.

The Exhibit below depicts North Highland’s Workforce Transition workstream and shows how related deliverables build off information gathered and analyzed throughout the Project.

![Exhibit 1: Workforce Transition Workstream](image)

Additionally, the Workforce Transition workstream analysis and deliverables are also used by the North Highland team to develop the Organizational Change Management (OCM) activities; to assess how the needs of stakeholders can be addressed throughout the Project; and to inform how the organization as a whole can respond to the changing environment of its workforce.

1.1 PURPOSE

The RLMS will change the way people work to complete activities across the regulatory lifecycle and the way this technology is supported across the department. With the anticipated improvement in system capabilities such as workflow, business rules, mobile access and self-service, data entry tasks will shift from FDACS staff to the customer, offering FDACS staff the opportunity to spend more time on higher-value duties, and for staff in the field to move towards paperless workflow and real-time data entry into the RLMS.

The purpose of the Workforce Training Plan, Section 3, is to define the proposed strategy and approach to training for rolling out RLMS Release 1; the major training areas of identified need (by role / process); the preferred types and styles of training see Stakeholder Analysis, OCM Assessment and Plan (Deliverable D4A-B-C); and an outline training plan with measures of success and expectations for RLMS Vendors / System Integrators (SIs).
Additionally, the Workforce Transition Plan, Section 4, defines the activities and high-level visual roadmap needed to ensure:

- FDACS RLMS End Users have the needed knowledge, skills and abilities to perform their roles when the new system and ways of working are rolled out.
- FDACS IT staff performing regulatory lifecycle application support roles have the correct knowledge, skills, abilities and operating model to perform their roles.

The efforts described in the Workforce Training and Transition Plan inform FDACS staff about defined and observed training and transition needs gathered throughout the development of the other OCM and Workforce Transition deliverables. Strategies to address these needs are the foundation for ongoing training activities in alignment with the continued organizational development for RLMS. As the RLMS is implemented and as it evolves, FDACS can update the Workforce Training and Workforce Transition Plan to align with the strategy, as needed.

It is expected that Contractors that compete to develop and implement the RLMS will respond to the contents of this document as part of creating the training plan component of their ITN response.

1.2 DESCRIPTION

As previously stated, this document (Deliverable D5B-C) develops key components that are critical for executing training and workforce transition activities in support of RLMS deployment:

- The Workforce Training Plan
- The Workforce Transition Plan

Section 3: Workforce Training Plan. This section presents the strategy and approach for developing the Workforce Training Plan for RLMS. The plan is composed of the identification of learner groups (Section 3.3), Attachment I Learning Matrix (Section 3.4) and key post-implementation support considerations including measurement of training effectiveness (Section 3.5). Additionally, infrastructure needs are addressed (Section 3.7) and components of the Training Cost Model are identified (Section 3.8).

By its dynamic nature, the Learning Matrix is intended to be a living document throughout the deployment of the RLMS releases, and can be expanded and revised as necessary by individuals who hold RLMS Training roles.

Section 4: Workforce Transition Plan. This section defines the key activities related to supporting FDACS RLMS End Users and IT resources for acquiring new knowledge and successfully adopting the new system, and presents a high-level visual roadmap needed to ensure and guide coordination, timing and sequence of Workforce Transition Plan execution.
1.3 SCOPE STATEMENT

The scope of the entities addressed in this deliverable includes individuals, teams and functions within FDACS that perform regulatory lifecycle-related activities. This includes FTE (Full-Time Equivalent), OPS (Other Personal Services) and temporary staff positions that will be using the RLMS.

Areas in scope for RLMS Release 1:

- Division of Licensing (DOL)
- Related revenue collection, processing and mailroom roles / activities in the Division of Administration (DOA)
- Office of Agricultural Law Enforcement (AgLaw) for the regulatory investigative activities it performs on behalf of DOL

Areas in scope for future RLMS releases:

- All other bureaus or programs within divisions or offices which perform regulatory lifecycle-related activities

Areas not in scope:

- Any bureau or program within a division or office which does not perform regulatory lifecycle-related activities
- Inspections carried out by the Division of Fruit and Vegetables (F&V) on behalf of the USDA (e.g., tomatoes and peanut grading)

SECTION 2 NORTH HIGHLAND APPROACH / ASSUMPTIONS

2.1 APPROACH

North Highland has taken an incremental and iterative approach to developing this deliverable, with the initial effort focused on RLMS Release 1. This document aims at assisting the department in framing and addressing its workforce transformation skills and capabilities needs along the RLMS implementation journey.

Activities North Highland has performed specific to this deliverable:

- Developed an outline Training Strategy, Guiding Principles and Approach
- Created an RLMS-specific Learning Matrix, leveraging the RLMS Enterprise Functional Capabilities Model (EFCM) and the RLMS Workforce Vision and Guiding Principles (in the Workforce Transition Analysis Deliverable D5A in Section 7, Appendix II and the Business Process Re-engineering (BPR) workstream Use Cases)
- Developed elements of a budgetary cost model to feed into the project cost model
- Identified workforce transition activities, sequencing and milestones

**Inputs:**

- RLMS Enterprise Functional Capabilities Model (EFCM) from the [Workforce Transition Analysis (Deliverable D5A)](#)
- Information on preferred training approaches by division, in Section 4 of the [Stakeholder Analysis, OCM Assessment and Plan (Deliverable D4A-B-C)](#)
- Outputs from the high-level regulatory lifecycle skills assessment and the development of the role profiles (from [Deliverable D5D- Role Based Skill Assessment and Gap Analysis](#)), in Section 4
- Meetings / calls / briefings / workshops with leadership from DOL, DOA and the Division of Consumer Services (DCS)
- Training and Development
- Input from other workstreams (BPR, Systems and Data).
- North Highland experience with technology-driven workforce transformation
- Current and in-depth knowledge of the State of Florida and its agencies
- Methodology and management implementation training and workforce transition best practices
- Coordination across RLMS project workstreams for developing the Workforce Transition Timeline and Roadmap in this deliverable

**Outputs:**

- Training Strategy and Approach
- Recommendations for training / model / media type
- A Learning Matrix with Training Modules by role
- Measures of Success
- A strategy for post-implementation support
- Identified infrastructure needs to be addressed as part of the RLMS Project
- Components of a budgetary training cost model
- Workforce Transition Roadmap with a visual representation of key activities and milestones
- A description of activities and milestones required to transition the workforce
2.2 Assumptions

The following assumptions underpin the development of this deliverable:

- The Workforce Transition Plan developed for RLMS Release 1 will be leveraged to develop similar transition plans for future RLMS releases.
- There is widespread support at the highest levels of responsibility in the department for the vision guiding this effort and for implementing the transition plan to achieve quality, consistency and expediency goals in regulatory services.
- The Workforce Training and Transition Plan is used as an input by the selected RLMS Vendor / SI / Contractor, to develop a training implementation plan (in conjunction with the FDACS Training and Development Section) that leverages the approach, strategy and recommendations.
- Recommended Training Modules are based on the Business Process Re-engineering workstream product – D7A Use Cases.
- The RLMS Vendor / SI / Contractor will validate and supplement the suggested Training Modules based on ongoing development of the system.
- The Learning Management System (LMS), operated by the Training and Development section in DOA, will be the primary tool for managing all RLMS-related training activities.
- All training materials are developed either by the SI or the department.
- This document should be reviewed and updated periodically to keep pace with evolving RLMS implementation activities.
- Change Champions, as defined in the Stakeholder Analysis, OCM Assessment and Plan (Deliverable D4A-B-C), may also serve as Super Users.
- The system used by the SI to develop the Training Modules will integrate with the department's LMS for the purposes of management, coordination and tracking.
- The Computer-Based Training (CBT) curriculum developed for the RLMS can be accessed and completed at all geographic locations throughout the State.
- Tax Collector Rollout of the Concealed Weapon Intake System (CWIS) for initial application submissions and the Concealed Weapons Renewal Express (CWREX) for renewal application submissions will be complete prior to the RLMS Release 1 Go-Live.

SECTION 3 WORKFORCE TRAINING PLAN

3.1 Guiding Principles

The following guiding principles set the framework for a training strategy and approach to ensure RLMS users are able to perform their roles in the new environment and derive maximum benefits from the system.
The Workforce Training Plan:

› Is established from a competency-based model (See Deliverable D5D-Role Based Skill Assessment and Gap Analysis).
› Is designed to be flexible and adaptable to incorporate lessons learned during the ongoing RLMS-driven transformation journey.
› Is aligned to changing business needs.

FDACS Training and Development section within DOA retains responsibility for the Business Skills training for users.

The FDACS RLMS Training Lead (see Section 3.2) is responsible for working with divisional leadership and Subject Matter Experts (SMEs) to develop regulatory policies and procedure training, division-specific training, on-boarding training, workflow and business rules training and points of manual data exchanges (non-system handoffs).

Division staff act as SMEs to define process and procedural content to be included in training design (Training Module curriculum) and development (training materials).

The divisions are responsible for regional office process and procedure training and on-boarding.

Training is provided in a cascading model where Super Users are trained first, and End Users are trained next with support from Super Users.

Training is provided in a blended delivery model where the best suited training medium is used to deliver training to learners.

Training is provided just-in-time, so that learning is recent and can be applied soon after skills acquisition.

Training curriculum and content is refined and evolved through releases to match with the expanding functionality of the enterprise system.

Every six months the RLMS curriculum is reviewed and updated to reflect the most current process in the RLMS (including any training content remediation).

3.2 Training Strategy

Training development, delivery and management reflects a highly integrated set of activities involving the SI, the FDACS Training and Development section, the divisions, and the RLMS Project Team. The diagram below shows the RLMS Training Functional Model and overall interactions of the parties (with a supporting Exhibit to define the roles).
The table below provides a description of the major roles and corresponding responsibilities that are part of the overall training strategy.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>RESPONSIBILITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>FDACS RLMS Training Lead</td>
<td>A member of the OCM Team who is specifically designated as the Training Lead. This person will work with the Training and Development Training Lead and the SI Training Lead to ensure the curriculum and training to be developed by the SI is coordinated with other project activities and department priorities. This person is responsible for assisting the OCM Lead with communication regarding training. The RLMS Training Lead will monitor training development, review, approval and delivery to help maximize training effectiveness.</td>
</tr>
<tr>
<td>Training and Development Training Lead</td>
<td>A member of the Training and Development staff who will work with the RLMS Training Lead and the SI Training Lead to leverage the capabilities of the LMS. This person will help with the tracking and monitoring of the training activities.</td>
</tr>
<tr>
<td>SI Training Lead</td>
<td>A full-time SI staff member exclusively dedicated to the development and delivery of RLMS Training as outlined in this plan and agreed to by the department. This person will oversee the SI Training Team and coordinate Training activities with the RLMS Training Lead and Training and Development Training Lead.</td>
</tr>
<tr>
<td>SI Training Team</td>
<td>A staff of fully dedicated SI FTEs responsible for RLMS curriculum development and training delivery.</td>
</tr>
<tr>
<td>SI RLMS Technical Liaison</td>
<td>A staff member of the RLMS SI technical staff who is responsible for assisting the SI Training Team develop training curriculum that reflects the current functionality of the deployed system.</td>
</tr>
</tbody>
</table>
### ROLE | RESPONSIBILITIES
--- | ---
SI RLMS Testing Lead | Responsible for ensuring that User Acceptance Testing (UAT) is extended to the Super Users, and that Super User UAT feedback is incorporated into the system design, and UAT Tester Training.

*Note: An important part of this training strategy is the involvement of Super Users in the User Acceptance Testing process and for the purposes of this plan, the training normally provided to UAT testers and the testing process itself, is considered additional training for Super Users.*

### LEARNER GROUPS | DESCRIPTION
--- | ---
Super Users | A group of FDACS employees that have been specifically selected to learn about the RLMS System in depth and have agreed to provide onsite support and coaching to staff during Go-Live and Post-Implementation. Super Users should represent each geographical area or functional work group.

Frequently, the same individuals selected as Change Champions will often serve in this role.

Internal End Users | FDACS employees who will use RLMS.
External End Users | People who use RLMS but are not directly employed by FDACS (i.e., tax collectors’ staff).
Reporting Specialists | Internal End Users who are required to generate reports or data analysis other than those found in the standards RLMS reports.
IT Support Staff | Support and maintain RLMS after the warranty period.
Customers, License Holders, Applicants, Consumers, General Public (Customers) | Customers, License Holders, Applicants, Consumers, General Public. Any individual who is requesting or receiving a service from FDACS, or is impacted by the RLMS.

### Exhibit 3: RLMS Training Roles

As part of the OCM Team, the FDACS Training Lead works with FDACS Training and Development representative(s) to coordinate the SI’s development and delivery of RLMS Training Modules. Similarly, the SI will provide a Training Lead, staff the SI RLMS Training Team, and provide technical support as needed to ensure quality curriculum development for a variety of learners / audiences.

The expectation is the SI will develop a curriculum that promotes the learner / audience’s participation, measures and tracks progress with the department’s LMS, and if possible, uses the LMS for the curriculum delivery. While the majority of curriculum is to be developed as CBT modules suitable for End Users, it is also anticipated the SI will develop specialized, instructor-led training for Super Users, Reporting Specialists and IT Staff supporting regulatory applications. Additionally, the SI is expected to develop online tutorials and training videos for Customers, and provide contextual help in the RLMS application (if possible).

As discussed in Deliverable 5A – Workforce Transition Analysis, the focal point for driving alignment to achieve the goals of the RLMS Future Workforce Vision is competencies. There
are three key dimensions to competencies that are critical in any workforce transformation effort:

- Assessing and ensuring employees have the necessary skills to meet the needs of the customer and the organization
- Defining and providing any needed training and coaching to meet the desired competency thresholds
- Ensuring competency mastery is clearly mapped to career development and opportunities for employees

The overall RLMS Training Strategy can be defined as “ensuring the right resources receive the right level of systems- and related training at the right time to be comfortable and successful in using the new system.”

### 3.2.1 TRAINING RESPONSIBILITY

The Exhibit below (also available in the ‘Module Mapping’ tab of Attachment I: RLMS Learning Matrix) outlines the potential RLMS Training Modules (to be reviewed by the SI and aligned to existing training curriculums they deploy). These modules are primarily based on the Use Case scenarios developed by the BPR workstream and, where relevant, they are color coded to key regulatory lifecycle areas, and assign training accountability for each currently identified module.

Key concepts / assumptions at the core of this schematic and the Workforce Training Plan developed in this deliverable:

- General system-related training modules are needed to ensure effective use of the system. **Core System Functionality** (general users) and **System Administration** (for individuals responsible for updating and managing information in RLMS) modules are not regulatory lifecycle activities-specific. Training accountability for these resides with the SI.
- The SI is also responsible for most regulatory lifecycle-related Training Modules that highly leverage RLMS functionality – **Regulatory Lifecycle-Specific Modules**.
- The following training modules are expected to be the responsibility of the divisions:
  - **Customer Service & Stakeholder Interaction** – which is key to department’s culture and ways of working.
  - **Regulatory Policies, Procedures, Statutes & Rules** – which represent base knowledge requirement for performing a division’s responsibilities.
- Training for **Business Skills** is the responsibility of Training & Development and is out of scope in this deliverable. This department function is already engaged on execution of business skills development and is launching a new LMS.
### Exhibit 4: Potential RLMS Training Modules and Training Accountability

The mapping format and language in the Exhibit above is also reflected in the structure of the Learning Matrix developed in Section 3.4.

#### 3.3 TRAINING APPROACH

The SI is expected to work with the RLMS Project Team Training Lead and the FDACS Training and Development section to ensure that the training plan is comprehensive and addresses all known learner / audience needs.

This Training Approach relies on a blended delivery model that provides System Functionality, Regulatory Lifecycle Technical Skills, and Business Skills to the appropriate learner population. The approach significantly leverages Super Users as mentors and Computer-Based Training as primary avenues for training delivery.

Key elements of the training approach:
- Provide common overall introductory system training;
- Train on policy, workflow, and business process prior to system training;
- Provide System Training and Regulatory Lifecycle skills training;
- Utilize the most appropriate mechanisms for delivery of training;
- Ensure training is delivered at the right time and to the right audience;
- Create relevant and useful supporting resources (manuals, quick start guides, job aids, and videos);
- Provide specialized, in-depth reporting and analytics training to select individuals.

System Functionality and Regulatory Lifecycle Technical Skills training development and delivery is primarily the responsibility of the SI, and encompasses all the new information RLMS system users will need to possess in order to operate the new system. At a minimum, the SI will train Super Users, End Users, IT Staff and Reporting Specialists, and will create customer self-service web tutorials for main customer interfaces.

![Diagram of training approach]

**Exhibit 5: RLMS Training Approach by Area and Audience**

The approach to training for each group of learners or audience in the table above is discussed with additional detail in the following sections.
3.3.1 **Super Users**

For the purposes of RLMS Release 1 (and as needed for subsequent releases) the expectation is the SI will train a group of FDACS future RLMS users (~100 for Release 1) who, after intensive training, will be able to serve as:

- User Acceptance Testers (Internal Users).
- Training support resources for their work areas or functional team.
- Operational support resources during the system rollout and Go-Live.

The number of Super Users for each work area or functional team is distributed at the discretion of the department, but a general distribution is recommended as follows:

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<tr>
<th>Work Area / Functional Team</th>
<th>Distribution</th>
<th>Total</th>
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<tr>
<td>Regional Offices (8)</td>
<td>1-2 per Regional Office, depending on size and number of users</td>
<td>8-16</td>
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<tr>
<td>Tax Collectors</td>
<td>1 per Tax Collector’s Office</td>
<td>40</td>
</tr>
<tr>
<td>Bureau of License Issuance</td>
<td>1 per section (2 in 790, 3 in 493)</td>
<td>5</td>
</tr>
<tr>
<td>Bureau of Regulation &amp; Enforcement</td>
<td>1-2 in Legal; 1 in Compliance Review ; 2 in Regulatory Review</td>
<td>5</td>
</tr>
<tr>
<td>Bureau of Support Services</td>
<td>1 in Fiscal; 2 in Document Support</td>
<td>3</td>
</tr>
<tr>
<td>Public Inquiry</td>
<td>3 in Public Inquiry</td>
<td>3</td>
</tr>
<tr>
<td>AgLaw</td>
<td>Distributed as needed (2 per region)</td>
<td>8</td>
</tr>
<tr>
<td>DOA</td>
<td>1 for Mailroom</td>
<td>1</td>
</tr>
<tr>
<td>IT Staff (Application Support)</td>
<td>Distributed as needed</td>
<td>6</td>
</tr>
<tr>
<td>IT Staff (Service Desk)</td>
<td>Distributed as needed</td>
<td>4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>83-91</strong></td>
</tr>
</tbody>
</table>

Exhibit 6: Suggested Distribution of Super Users

Training for Super Users is conducted in group format, in a face-to-face setting via instructor-led training (ILT):

- Held in at least 3 geographically distinct areas of the state (north, central and south).
- Conducted in a setting where Super Users are walked through the applicable system business rules and processing.
- Provided in a setting where Super Users are given opportunities to ask questions and thoroughly develop their understanding of the system.

Super Users are also expected to complete all the modular training developed for End Users.

*Note: It is recommended that Super Users participate in a structured review of the CBT training materials prior to acceptance by FDACS. It is also recommended after their initial training, Super Users participate in system, integration and user acceptance testing as part of their learning reinforcement.*
Super Users are critical front-line support resources during system rollout and Go-Live, acting as Level 1 support for End Users who exhaust built-in system help features and any local supervisory assistance.

Super Users participate in reporting defects and coach End Users on how to use the system, how to use approved workarounds, and help End Users open service desk tickets or open tickets on the End User’s behalf during Go-Live. After rollout and Go-Live, Super Users will continue to meet in weekly (or as needed) conference calls to discuss system updates, defect corrections and / or additional system releases.

Note: The department may want to require the SI to develop a modified version of the Super User Training that is customized for tax collector Super Users. This training may be shaped differently to address the limited regulatory lifecycle functions performed by the tax collectors’ staff and may be used in place of the current train-the-trainer approach.

Recommended Training Mode / Media Type: Face-to-face setting via ILT, CBT, User Acceptance Testing and Instructor-led Tester Training, On-the-Job Training.

3.3.2 END USERS (INTERNAL AND EXTERNAL)

The SI will be expected to leverage the FDACS LMS to develop, deliver, monitor and track CBT modules for System Functionality and Regulatory Lifecycle Technical Skills. Exhibit 4 above outlines the recommended Training Modules that are the responsibility of the SI. The SI will review and validate the list of recommended Training Modules and, in agreement with the department, will develop a plan to deliver training customized to the final system design.

It is expected the CBTs will guide learners through the modules and test a learner’s mastery of the information at the end of the modules. It is also anticipated the modules will be available for learners to return to as needed to refresh their learning. The modules need to allow learners to complete partial lessons and begin again where they left off upon their return to the module.

End User training should be provided no less than four weeks prior to the Go-Live date and no earlier than eight weeks before system rollout. The Training must be available electronically, state-wide – thereby mitigating the need to travel.

The department will monitor CBT training and provide refresher / reinforcement training on topics where staff are consistently challenged.

Note: External End Users (i.e., the tax collectors’ staff), by nature of their limited Regulatory Lifecycle Management responsibilities, will be required to take a smaller set of CBT modules.

Recommended Training Mode / Media Type: CBT, Super User coaching and mentoring, on-the-job training, webinars and conference calls.
3.3.3 IT SUPPORT STAFF

Because the RLMS is going to eventually be handed over from an SI to the department, there is a need to specify training courses for those people who are going to have IT operations and maintenance responsibilities for the system. The following roles require specialized training the SI needs to develop and deliver during the RLMS Project. Some of the on-the-job training may be most effectively delivered by having these roles work alongside or shadow the SI vendor staff at an appropriate point in the Project. In addition, as with Super Users, these roles will need training on the SI-provided defect logging and tracking system.

It should be noted, the IT support staff roles outlined below are potential examples as the Future IT Operating Model for RLMS has not yet been defined; however, they do cover the major functional areas required for FDACS to provide effective ongoing support of the RLMS.

Application Administration (Configuration / Static Data / User Access)

The expected responsibility for this role type will be the ongoing maintenance of the RLMS static data (e.g., license types, locations and demographics), the configuration of agreed future enhancements, and the maintenance of user access (e.g., role definitions, adding users to groups, security levels).

To this end, these roles need detailed training on the application administration modules, specifically around user administration, configuration, the business rules and workflow, as well as an overview of the total functionality of the RLMS.

Recommended Training Mode / Media Type: Face-to-face setting via instructor-led training, CBT (for overview modules), On-the-Job Training.

Business Analyst (Workflow & Business Rules / Reporting)

The Business Analyst role is expected to work with the Super Users and leadership in the divisions to assist with the capture, documentation and testing of future enhancements, along with any changes required to workflows or business rules due to changes in policy, procedures or organizational structure. The Business Analyst will also work with those roles identified as reporting specialists to assist with the development, testing and refinement of reports from RLMS. There is an option for this role to continue as part of ongoing Project support.

To this end, individuals serving in the Business Analyst role need training on the Workflow and Business Rules module, along with an overview of the application architecture, to understand what is feasible and not feasible when it comes to future enhancements. This role would also need to understand the overall functionality of the system; therefore, it is suggested resources assigned to this role take all training modules.
**Recommended Training Mode / Media Type:** Face-to-face setting via instructor-led training, CBT, On-the-Job Training.

**Technical Support (Service Desk / Infrastructure Support)**

The SI will make available Training Modules for IT support staff who are going to be providing first and second / third line support. This will include those resources who are part of the IT service desk in OATS, as well as staff who in the long term will be managing any internal enhancement requests and configurations. The proposed outline to this approach is further detailed in the updated [Implementation Plan](#) and in Section 3 of this document.

IT service desk staff will need to have an overview of all functionality across the application, including the self-service portal, especially if the decision is made that technical support is going to be provided to customers, particularly in the initial rollout.

For any infrastructure and interface support roles, staff will need to have customized training depending on the application delivery model (e.g., On-premise versus Cloud), the types and nature of the interfaces of the systems and the tools provided to support ongoing data exchange.

**Recommended Training Mode / Media Type:** CBT, Face-to-face setting via instructor-led training, On-the-Job Training.

### 3.3.4 Reporting Specialists

The SI is required to develop specialized reporting and data analytics user Training Modules designed for a face-to-face setting via instructor-led training. End Users who have a greater need for report creation, data queries, merging data from multiple sources, data analysis, trend reporting, predictive analysis and / or retrieving data from other systems require training beyond the general reporting CBT. This course should be offered multiple times prior to each release rollout. Over time, the department will take full ownership of this course curriculum and offer it as regularly scheduled training for FDACS employees.

**Recommended Training Mode / Media Type:** CBT, Face-to-face setting via ILT.

### 3.3.5 Customers

For Customers and other external RLMS users, the expectation is that the SI develops a series of online training webinars / vignettes or tutorials that will be available through the FDACS website and other channels (such as YouTube). These Training Modules should demonstrate how Customers are able to utilize the new RLMS functionality, and highlight the differences between old processes and new processes.

**Recommended Training Mode / Media Type:** On-line, RLMS user interface tutorial / module, YouTube.
3.3.6 ADDITIONAL MATERIALS AND JOB AIDS

The SI Training Lead and Training Team are required to work with the FDACS RLMS Training Lead to develop additional material and job aids. These materials are distributed to learners as needed, and also posted on a department intranet site specifically designed for housing and presenting RLMS training information. Items that may be included on this site:

- An online module developed for new employee orientation and on-boarding to RLMS;
- RLMS Training Schedule;
- Frequently Asked Questions;
- Policy and procedure crosswalk from current state to future state functionality;
- OCM communications collateral;
- RLMS quick reference cards;
- Quick Start guides;
- Known issues and workarounds (during rollout and Go-Live).

3.4 RLMS LEARNING MATRIX

The RLMS Learning Matrix has been developed to accomplish a number of purposes. It should be used by:

- SI vendors to shape their response on how they will staff their SI Training Team and how they will develop and deliver RLMS-related training.
- FDACS Training and Development to plan how they will meet the demand for Business Skills Training.
- Divisions to understand and plan for their role in preparing RLMS users to be ready to complete their work in the new system.

The Exhibit on the next page shows a snapshot of the RLMS Learning Matrix. The full version can be found in Attachment I: RLMS Learning Matrix.

It contains the following components:

- **Activity Area** – Grouping by a combination of process areas (e.g., Intake and Fiscal), and organizational area (e.g., Regional Offices).
- **Regulatory Lifecycle Functional Roles** – These are the same roles as defined in Deliverable D5D – Role-Based Skills Assessment and Gap Analysis.
- **# Positions** – The number of individuals that are included in that group or team.
- **Recommended Training Modules** – Across the top of the matrix recommended Training Modules are listed. The majority of the recommended modules are based on the Use Case scenarios developed by the BPR team and, where relevant, they are
color coded to key regulatory lifecycle areas. Business Skills Modules have been recommended based on the training needs defined in the Competency Model. The remaining modules have been suggested based on Use Case information and a set of commonly used training topics.

### Exhibit 7: Learning Matrix Snapshot

For each Regulatory Lifecycle Functional Role, North Highland has recommended a Learning Profile, or set of recommended Training Modules, that should be completed by individuals performing the role. Reading the matrix across a row, each module has been identified as mandatory (M), optional (O), or left blank as not applicable. For the Regulatory Lifecycle-Specific modules, this was based on the competency profile for each role, as defined in the Competency Profile tab of the Learning Matrix. It is expected that specific training requirements for each role will need to be refined as the RLMS project progresses, in consultation with the SI Vendor.

A person performing a specified role should be required to complete all of the mandatory modules for that role. The divisions should review the Learning Matrix and decide if the person performing the role should also complete any of the optional modules as part of their finalized Learning Profile.

Some individuals will have multiple overlapping responsibilities and will be required to take a blended set of modules. For example, someone serving in the capacity of a Super User would be required to take all of the modules, regardless of the Learning Profile for their Functional Role. Someone who will function as a Reporting Specialist will need to take the reporting-related Training Modules even if it is not part of their Functional Role Learning Profile.

![Learning Matrix by Role and Potential RLMS Module](image-url)
3.5 MEASURES OF SUCCESS

For the purposes of tracking and scheduling training, it is anticipated the departmental LMS system will be used. LMS competency measurement capabilities should be enabled to track individual levels of competencies and gaps that need closing throughout RLMS implementation. The LMS, hence, will be used to track achievement / mastery of each module and provide metrics, such as completion rates, which can be used to help assess levels of organizational readiness.

Data collected from the Change Readiness Surveys (recommended in Deliverable D4D-E Communications and Change Readiness Plan) can be examined alongside performance data from the LMS. This analysis can be leveraged to further evaluate organizational readiness and assess whether gaps in readiness are being closed via the completion of training. Metrics that demonstrate a lack of proficiency, or show difficulty learners may experience while progressing through the curriculum, can be used to inform refresher or just-in-time training to achieve desired readiness and address any other learning-related issues prior to Go-Live. These just-in-time trainings can be offered by the department via webinar, conference call or other communication medium.

Training is about influencing business performance by improving individual and group performance through the achievement of new knowledge or skills. Some suggested measures and metrics to track this performance are listed in the Exhibit below:

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>HOW</th>
<th>SUGGESTED METRIC TARGET</th>
<th>IMPORTANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of individuals completing by module</td>
<td>LMS data</td>
<td>100%</td>
<td>Leading up to Go-Live, it is important to track who has completed their required training. Individuals who have not completed training prior to Go-Live should not be allowed to use the new system until training is complete.</td>
</tr>
<tr>
<td>End User performance by skill</td>
<td>LMS data</td>
<td>95% pass rate on each module</td>
<td>Leading up to Go-Live, it will be important to monitor End User performance by skill or competency on module completion. Module elements with a high number of incorrect responses, or modules that show a high frequency of user repetition, or modules that cannot be mastered are targets for reinforcement training or just-in-time training.</td>
</tr>
<tr>
<td>Participant assessment of individual modules</td>
<td>Course Evaluation</td>
<td>TBD</td>
<td>End-of-module evaluations with low scores should be used to target training modules to be revised or refreshed.</td>
</tr>
<tr>
<td>Measure</td>
<td>How</td>
<td>Suggested Metric Target</td>
<td>Importance</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Effectiveness of training                    | Change Readiness Assessment Questions                                  | Avg. Score >1 in the relevant questions | Learners will have an opportunity after training to participate in readiness assessment(s) and share their insights about the effectiveness of training. Any scores below a “1” for the following questions should initiate a follow-up and a review of the training materials:  
  - I know where to go to find out more information about RLMS.  
  - I have a clear understanding of the skills I will need to perform my role with the new system.  
  - I am being given the necessary training to help me perform my role with the new system. |
| Confidence in the use of the system          | Change Readiness Assessment Questions                                  | Avg. Score >1 in the relevant questions | Learners will have an opportunity after training to participate in the readiness assessment(s) and share their insights about their ability to use the new system. Any scores below a “1” should initiate a follow-up and review of the training materials:  
  - I have the ability to implement the new skills to use the new system.  
  - I have practiced performing with the new system.  
  - I can get support when I have problems and questions. |
| Customer Service / Satisfaction              | Online survey / Self-Service Portal site-based survey                 | TBD                      | Once customers begin receiving services via the new RLMS system, they need to be randomly surveyed to assess the effectiveness of the Customer Service & Stakeholder Interaction Training Module. |
| End Users’ ability to correctly complete Regulatory Lifecycle activities | Number of End Users’ incidents raised to Service Desk with regard to use of RLMS | A decreasing trend of received service desk calls | The trend of service desk calls being received regarding End User processing should decrease over time. A decreasing trend of service desk calls will indicate that training is being reinforced with on-the-job experience with the system. An increasing trend in service desk calls will indicate a need for improved training. |
| End User errors in using the system          | RLMS metrics                                                         | A decreasing trend of error found in RLMS processing metrics | Metrics available from the RLMS will reveal problem areas to be targeted for additional or modified training. |
Exhibit 8: Suggested Measures and Metrics

Note: During the procurement the department should negotiate with the SI to mutually develop / enhance and formalize the Suggested Measures and Metrics to be captured to support training evaluation and continuous improvement.

3.6 POST IMPLEMENTATION SUPPORT

3.6.1 APPROACH

After the RLMS system is operational, post-implementation training support should consist of continuation of Training Support Roles, along with continuous improvement of the training process and content, all supported by ongoing tracking and reporting on the previously described measures and metrics.

Continuation of Training Support Roles

During Post-Implementation, the department should assess the need for continuation of the training support roles that have been established for Release 1, and address any training support gaps that will occur as the SI Training Team decreases its support capacity. The table below outlines the assessment criteria and corresponding recommendations for continuation of the training support roles required to successfully operationalize the RLMS.

<table>
<thead>
<tr>
<th>ASSESSMENT AREA/ISSUE</th>
<th>RECOMMENDATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the department need to maintain:</td>
<td>Maintain current recommended Release 1 roles and responsibilities</td>
</tr>
<tr>
<td>▪ Training and Development Training Lead</td>
<td></td>
</tr>
<tr>
<td>▪ Staff assigned to coordinate and deliver Business Skills Training</td>
<td></td>
</tr>
<tr>
<td>▪ Staff coordinating the use of the LMS to support the RLMS</td>
<td></td>
</tr>
</tbody>
</table>
### ASSESSMENT AREA/ISSUE

| Does the RLMS Training Lead continue to have responsibilities in future Releases? | RLMS Training Lead should continue current responsibilities for future releases (or be reestablished at the recommended Release 1 level of responsibility and activity). |
| Will Super Users be maintained as system enhancements are made and introduced to users? | Super Users should maintain their role, but at a lesser capacity from their peak level of activity until the department anticipates no further major enhancements to the system. *Note: New Release 2 Super Users will need to be named and trained for the role just as they were for Release 1.* |
| Will the Super Users for tax collectors’ offices retain their responsibilities? | Super Users for tax collectors’ offices should maintain their role, but at a lesser capacity from their peak level of activity until the department anticipates no further major enhancements to the system. *Note: For future release, new Super Users will need to be identified for each office that will be implementing RLMS and trained alongside other Super Users.* |
| How will CBT and ILT curriculum be kept up-to-date as system enhancements are released? | The SI Training Lead and the SI Training Team may reduce the number of staff once the Release 1 curriculum is finished and deployed, but a subset of staff must be maintained to refresh CBTs and ILTs as enhancements are made to Release 1. For future releases, the SI Training Lead and SI Training Team should be staffed to resume all training coordination and delivery requirements including CBT and ILT curriculum and Super User Training. |
| How will CBT and ILT curriculum be refreshed for future releases? How will the next group of Super Users be trained? | |

### Exhibit 9: Training Support Roles Assessment Criteria and Recommendations

In summary, RLMS training resource / capacity and roles should be maintained at reduced levels following Release 1, and should be reestablished to levels recommended for Release 1 with each new Release. Two areas that deviate from this pattern are the Training and Development roles and responsibilities, which should be maintained at current levels throughout the department-wide RLMS deployment, and the SI curriculum development staff which may be reduced after Release 1.

**Continuous Improvement and Training Adjustment**

In an effort to continually improve all training efforts related to RLMS, the RLMS Project Team should survey the various stakeholder groups for information about the quality and effectiveness of the training they were provided. These results should be used in conjunction with data and measurements taken from the LMS, along with other relevant training-related surveys, and relevant service desk metrics to identify gaps in training, ways to consolidate and deliver training more effectively, and provide ideas for new training that should be developed. All mediums and modes of training should be evaluated for improvement opportunities no less than six months in advance of the next release so training materials and curriculum can be modified appropriately.
3.6.2 **Recommendations:**

- Any training material and courses will be updated and refreshed as new functionality is developed and rolled out.
- Training modules should remain available for eligible users to download. Recordings/webinars and ILTs should be made available online so that learners can use them as refresher training.
- All training materials developed through the DDI phase will be handed over to nominated members of the RLMS project team or designated training owners.
- Any policy and procedures that are developed by individual divisions (with emphasis for DOL and AgLaw) will include all needed references to the RLMS system.
- Once the department is solely responsible for creating enhancements to the RLMS, RLMS IT Support Staff will work with the divisions and Training and Development to coordinate training refreshment needs.

3.7 **Infrastructure Needs**

This section explores infrastructure needs to meet training requirements. Three major themes emerge as the set of critical training infrastructure dimensions:

- Training Roles and Responsibilities – definition and assignment of roles and coordination dynamics;
- Delivery of Training – technology and other infrastructure resources;
- Evaluation and Continuous Improvement – measurement of training effectiveness and learnings for improvement of content and delivery.

The following Exhibit lists observations and opportunities, grouped around the themes above, for strengthening the current FDACS infrastructure to support a successful RLMS implementation with recommendations to help ensure the success of the proposed training approach.

<table>
<thead>
<tr>
<th><strong>Opportunities</strong></th>
<th><strong>Recommendations</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training Roles and Responsibilities</strong></td>
<td>Documented and agreed training roles and responsibilities need to be communicated across RLMS teams, and resources need to be assigned.</td>
</tr>
<tr>
<td>The training approach and model presented in this deliverable allow the department to identify clear training-related roles.</td>
<td>FDACS should dedicate a Project Team member to support the OCM Team for the purposes of training communication and coordination.</td>
</tr>
<tr>
<td>Training is an integral part of Organizational Change Management, and Exhibit 2 outlines relative roles and coordination dynamics.</td>
<td></td>
</tr>
</tbody>
</table>
**OPPORTUNITIES** | **RECOMMENDATIONS**
--- | ---
The department and North Highland have given deliberate consideration to the governance and coordination needs across teams assigned to RLMS implementation activities. | The developed agreed lines of communication between the OCM Team and RLMS Governance roles ensure smooth interaction of training elements. Coordination and accountability strengthen the OCM Governance Model and support the training governance. | The SI will bring training resources to the RLMS Implementation. | The department should make the design, development and delivery of the RLMS training the responsibility of the SI (for the module in scope for the SI per Exhibit 4 above) and ensure that the SI coordinates training with the FDACS RLMS Training Lead, and the Training and Development training representative. The SI will be accountable for ensuring the training is fully tested and approved in advance of training deployment. |

**TRAINING DELIVERY**

With the development of prior Workforce Transition and OCM deliverables, it is understood the Training and Development section is the owner of the LMS and has assumed responsibility for RLMS Business Skills training (already under their purview). | Additional staff may need to be brought on, even if only on a temporary basis, to assist Training and Development with the responsibilities associated with RLMS implementation support. The Training and Development section is a partner to the FDACS RLMS Training Lead and the SI RLMS Training Lead to ensure department-wide RLMS competencies-related training coordination occurs. | The department is in the process of implementing a new LMS with training delivery and tracking capabilities that can integrate with other (department and SI) RLMS Training activities. | The department should complete the implementation of the LMS and plan to leverage the LMS to deploy RLMS Training and tracking. Harvest information from the LMS to inform decisions regarding RLMS Training. | There is limited capacity currently in the department to deliver training. | Plan to leverage the SI’s capacity and expertise and reflect strategy and requirements in the development of ITN content. | Training needs will evolve over time and be defined by the SI in collaboration with the department based on project timing, training effectiveness feedback, types of learner groups to be phased in with each release, etc. | Capacity for training delivery needs to be monitored and assessed so appropriate levels of resources are deployed to ensure RLMS implementation success. |

**EVALUATION AND CONTINUOUS IMPROVEMENT**

RLMS implementation is a long-term effort for the department and its external partners, and there will be opportunities and the need to evaluate and further develop training materials. | Review training materials and refresh periodically. Review and refresh training materials prior to each release (or no less than every 6 months) so the curriculum always reflects the most current RLMS functionality.
The LMS will allow the department to capture performance metrics by module and also provides the opportunity to gather related data that will enhance training development and delivery.

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>RECOMMENDATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully deploy and leverage LMS capabilities to support RLMS implementation.</td>
<td>Use the LMS to schedule, deliver, monitor and measure the training associated with RLMS.</td>
</tr>
<tr>
<td>Develop a process and dedicate resources to address training topics that require additional explanation or reinforcement. This training can be provided as just-in-time training and webinars in the days and weeks prior to Go-Live.</td>
<td></td>
</tr>
</tbody>
</table>

**Exhibit 10: Training Infrastructure Opportunities and Recommendations**

### 3.8 COMPONENTS OF THE TRAINING COST MODEL

The purpose of this section is to present the major cost considerations related to the implementation of the proposed training strategy.

Generally, training cost budgets capture three key cost categories:

- Training development costs (personnel, equipment).
- Direct delivery costs (training materials, technology costs, facilities, travel, equipment, instructor costs, etc.) and indirect implementation costs (related overhead).
- Reduced productivity and backfilling positions during training (e.g., for Super Users).

The Exhibit below captures categories of key cost components for training development and delivery for RLMS Training support. Cost estimates will vary based on the projected number of training events and the number of expected participants in training (both to be determined in conjunction with the SI).

<table>
<thead>
<tr>
<th>TRAINING COST COMPONENT</th>
<th>CONSIDERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training materials</td>
<td>Direct costs related to the development of both electronic and paper-based training content and materials. These include the time and effort by resources, for both the SI and the department, for designing, producing and uploading training content; the direct costs of producing paper-based training materials; and any supplies needed for training activities.</td>
</tr>
<tr>
<td>Licenses for the training and other technology costs</td>
<td>Computer-based training often entails obtaining a sufficient number of licenses to execute training. Additionally, depending on the type and levels of available hardware at the department to deliver training, additional costs are often included to secure additional training stations and / or supporting connectivity technology.</td>
</tr>
<tr>
<td>Facilities</td>
<td>Several of the proposed training formats require access to facilities. The department needs to assess the training requirements and ensure that appropriate facilities are available and enabled. Additional costs may be incurred for securing physical space for training outside current available space.</td>
</tr>
</tbody>
</table>
### TRANING COST COMPONENT
<table>
<thead>
<tr>
<th>Component</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel costs</td>
<td>There will be travel costs associated for RLMS-related training. While proper technologies and facilities can mitigate the need to incur travel costs, the training cost model needs to budget for, and reflect, potential training-related travel costs.</td>
</tr>
<tr>
<td>Department resources (backfill)</td>
<td>Many department resources will engage as either learners or trainers in key roles to support training development and delivery. The opportunity cost of these resources performing activities other than their current operations activities can be significant, and budget dollars need to be allocated to address the need to temporarily backfill these resources. For example, Change Champions and Super Users can be expected to be dedicated full-time to the RLMS Project during peak transition periods such as UAT and Go-Live.</td>
</tr>
<tr>
<td>External resource costs (SI, OPS)</td>
<td>SI and / or OPS resources will be deployed specially for training-related activities, and these costs should be captured in the cost model and refined through procurement.</td>
</tr>
<tr>
<td>Outreach activities for Customers and other External Stakeholders</td>
<td>RLMS-driven changes significantly affect the customer experience and other external entities with vested interest in regulatory-related outcomes. Department resources will have to provide guidance, if not training, and explanation of these changes to these constituencies in the form of presentations and assistance with acclimation to the new self-service process. These temporary additional support costs can be classified as training activities and need to be reflected in the training cost model.</td>
</tr>
</tbody>
</table>

**Exhibit 11: Training Cost Model Components**

The FDACS RLMS Training Lead is responsible for managing these cost components and for reporting budgetary status to involved parties.

### SECTION 4 WORKFORCE TRANSITION PLAN

This section defines the key activities and provides the high-level visual roadmap needed to ensure the following:

- FDACS RLMS End Users have the appropriate knowledge, skills and abilities required to perform their roles when the new system and ways of working are rolled out.
- FDACS IT staff performing regulatory lifecycle application support roles have the right knowledge skills, abilities and operating model to perform their roles.

The intent for the Workforce Transition Plan is to have an easy-to-communicate timeline on a page, with supporting information about activities that will show the whole of the RLMS Release 1 DDI phase, and be useful to help explain project progress to Stakeholder Groups.

### 4.1 WORKFORCE TRANSITION ROADMAP

For the Workforce Transition Roadmap, the implementation timeline is structured around iterative project releases. Each release implements regulatory capabilities for a specified set of business areas (e.g., the first release will involve the Division of Licensing and Division of
Each release follows the same basic implementation lifecycle (Plan and Assess, Design, Develop, Test, Implement and Post Implementation). The timeline activities are organized by six implementation phases performed for each release lifecycle:

- **Plan and Assess** – Planning and preparation to facilitate the Design Phase;
- **Design** – Gather requirements, design processes, and solidify scope;
- **Develop** – Build the designed solution;
- **Test** – Test the designed solution;
  - **User Acceptance** – Process-oriented testing of end-to-end business functions performed by client End Users
  - **User Experience** – Non-technical testing designed to assess the system’s usability for client End Users
- **Implementation** – End User education, user acceptance, and migration activities;
  - **Preparation** – Activities to ensure system and organization readiness for Go-Live
  - **Go-Live** – Tasks used to transition the user community to the new system
- **Post-Implementation** – Transition from project mode into a live, supported production operation.

The Exhibit below provides additional detail on each release phase.

<table>
<thead>
<tr>
<th>RELEASE PHASE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan and Assess</td>
<td>The Plan and Assess Phase will be based on learning, new information, improved common understanding, and a dynamic business environment. Additionally, it is anticipated scope refinement and consequent recalibration will be required once the Process tasks are concluded in the Plan and Assess Phase. This will allow for more informed and effective planning of the work effort required to execute the Develop Phase.</td>
</tr>
<tr>
<td>Design</td>
<td>The objective of the Design Phase is to create a detailed description of FDACS’ business requirements, define the technical requirements to enable those business functions within the RLMS, and develop and begin implementing an approach to manage the impacts to the organization.</td>
</tr>
<tr>
<td>Develop</td>
<td>The objectives of the Develop Phase are to build/configure the system, conduct data migrations, and start preparing the organization for the impact of the changes. Building is comprised of configuring the system and creating development objects to address the specifications documented in the Design Phase.</td>
</tr>
<tr>
<td>Test</td>
<td>The objective of the Test Phase is to evaluate the system’s technical and functional compliance to specified requirements. The SI will be responsible for developing and executing a Test Management Plan appropriate for the solution and testing the system according to the approved Test Management Plan. This includes User Acceptance Testing to ensure the system delivers the desired functionality and supports all requested processes, along with the User Experience testing to ensure the system is intuitive and easy to use.</td>
</tr>
<tr>
<td>Implement</td>
<td>The objective of the Implementation Phase is to prepare systems, processes and people for the rollout and subsequent operationalization of the new system. The</td>
</tr>
</tbody>
</table>
implementation will include the activities supporting the Go / No-Go decision around system Go-Live, as well as operational readiness preparation such as training and internal and external communications. The overall purpose of implementation is to successfully move the system to production while ensuring the department and its stakeholders receive the maximum benefits from the RLMS Project. Implementation has been broken into two basic sub-phases: the steps needed to prepare for implementation, and the steps needed to perform the implementation (often referred to as Go-Live).

Implement – Preparation
The objective of Preparation is to verify readiness for production (Go-Live), including user acceptance, End User training, site preparation, system project management and cutover activities. Preparation serves as a last opportunity to address crucial open issues before Go-Live is reached.

Implement – Go-Live
After all the necessary implementation preparation steps have been completed (user training, data cleansing, etc.), implementation Go-Live tasks are used to transition the user community from the legacy applications to the new enterprise solution. Go-Live is the process of moving from a pre-production environment to a live production environment (going-live), and the beginning of transition of the production application to the support organization.

Post-Implement
Post-Implementation efforts are necessary to ensure gains are maintained and adoption is confirmed. Ongoing performance of actions in keeping with the direction agreed to at the end of each event is necessary to form a foundation for future improvements.

Exhibit 12: RLMS Release Phase Descriptions

Each of these release phases described above is broken down into domains which define the key activities and project team responsibilities. The tasks in the release phases are assigned to five basic domains (project teams):

- **Project Management** – Address return on sponsor investment for the Project (addressed in the PMP and the Project Schedule, not included as part of the Workforce Transition and OCM timeline).
- **People** – Facilitate effective and efficient transition to the new business model.
- **Process** – Address business requirements and benefits; develop business analysis capabilities and re-engineer business processes to accommodate the post-implementation future state.
- **Information** – Facilitate data strategy, data governance and migration strategy; address new ways of managing reports and business information.
- **Technology** – Facilitate information quality and integrity, integrate task and solution dependencies across domains and project phases, and deliver objects that address specifications and coding quality standards and management of appropriate application architecture and technical infrastructure; establish service desk policies, procedures and capabilities.
The roadmap illustrated in the Exhibit below and available as Attachment I RLMS Workforce Transition / OCM Timeline reflects a high-level view of the key activities and milestones associated with Workforce Transition and OCM.

Exhibit 13: Workforce Transition Roadmap Snapshot

The swim lanes in this timeline represent the four domains associated with Organizational Change Management and the Workforce Transition for the RLMS Project: People, Process, Technology and Information. The nominal project phases are indicated for both the DOL and DOA DDI sub-phases, which align to the RLMS Project Schedule. Activities are color-coded depending on who they apply to, for ease of identification.

4.2 WORKFORCE TRANSITION ACTIVITIES

Important Workforce Transition and OCM activities take place throughout each phase of the RLMS Project and across the People, Process, Technology and Information domains. The sections below provide a more detailed narrative for each of the activities on the timeline and indicate key dependencies between activities.
4.2.1 **People (Organization)**

The Exhibit below details all the activities and dependencies for the People – Organization workstream.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Key Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design IT Operating Model for Release 1</td>
<td>Work required to define the Organizational and Governance structures to ensure sustained support of the RLMS by the department.</td>
<td></td>
</tr>
<tr>
<td>Develop &amp; Confirm Roles and Responsibilities of IT Operating Model for RLMS Release 1</td>
<td>Moving beyond the high-level operating model into the detail of required roles. This will include input from the IT Skills Inventory exercise. Develop and socialize responsibilities.</td>
<td>Design IT Operating Model for Release 1</td>
</tr>
<tr>
<td>Refine RLMS IT Resource Requirements</td>
<td>Identify resource gaps, backfill needs and training / development needs from the current IT resource pool across OATS and Release 1 divisions.</td>
<td>Develop &amp; Confirm Roles and Responsibilities of IT Operating Model</td>
</tr>
<tr>
<td>Initiate IT Operating Model for RLMS Release 1</td>
<td>Rollout initial stages of needed IT and data governance to support RLMS during the DDI phase of activities.</td>
<td>Refine RLMS IT Resource Requirements</td>
</tr>
<tr>
<td>Conduct Individual Skills Assessment</td>
<td>Undertake the next level of detail of Regulatory Lifecycle Skills assessment at the individual position level in order to validate and confirm individual training needs, particularly with relation to business skills.</td>
<td></td>
</tr>
<tr>
<td>Develop Operations Transition Plan</td>
<td>As part of the Negotiation phase of the SI procurement, agree to a plan for Operational Transition of RLMS application support to FDACS staff (this may not happen until subsequent releases, depending on the agreed operations and maintenance agreement) and the approach to transferring knowledge.</td>
<td></td>
</tr>
<tr>
<td>Refine Role Profile Definitions</td>
<td>As part of the development of any role-based access to the RLMS and to support development of the Training plan, the existing role profiles that were developed as part of the Pre-DDI phase need to be updated and aligned with system role definitions.</td>
<td></td>
</tr>
<tr>
<td>Initiate Workforce Transition (DOL)</td>
<td>Any changes to roles and responsibilities and ways of working for those undertaking regulatory lifecycle-related activities in DOL as a result of the RLMS implementation.</td>
<td></td>
</tr>
<tr>
<td>Complete Workforce Transition (DOL)</td>
<td>All DOL users now utilizing the RLMS to deliver their core duties.</td>
<td></td>
</tr>
<tr>
<td>Undertake Knowledge Transfer to IT Support Staff</td>
<td>This encompasses the formal knowledge transfer from the SI vendor team to those people who will be fulfilling RLMS Application Support roles.</td>
<td>Develop Operations Transition Plan</td>
</tr>
<tr>
<td>Initiate Workforce Transition (DOA)</td>
<td>Any changes to roles and responsibilities and ways of working for those undertaking regulatory lifecycle-related activities in DOA as a result of the RLMS implementation.</td>
<td></td>
</tr>
<tr>
<td>Activity</td>
<td>Description</td>
<td>Key Dependencies</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Complete Workforce Transition (DOA)</td>
<td>All DOA users now utilizing the RLMS to deliver their core duties.</td>
<td></td>
</tr>
</tbody>
</table>

**Exhibit 14: People – Organization Workstream Activity Descriptions and Dependencies**
### 4.2.2 People (OCM)

The Exhibit below details all the activities and dependencies for the People – OCM workstream.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Key Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement OCM Governance</td>
<td>Begin to use the OCM Governance processes to make decisions about change management activities.</td>
<td></td>
</tr>
<tr>
<td>Initiate the Business Advisory Group</td>
<td>Commence meetings of the Business Advisory Group (BAG) to seek input regarding OCM and communications needs, as per the proposed OCM governance and functional model. Keep group informed of project activities.</td>
<td></td>
</tr>
<tr>
<td><strong>BAG (Milestone)</strong></td>
<td>Proposed meeting of the BAG suggested to occur monthly during the pre-DDI phase.</td>
<td></td>
</tr>
<tr>
<td>Identify/Coordinate with Other Departmental Change Initiatives</td>
<td>Identify and record, with the help of the BAG, other significant changes happening throughout the department or other major departmental initiatives. Identify the executive sponsorship of these initiatives and coordinate RLMS OCM activities.</td>
<td>Initiate the Business Advisory Group</td>
</tr>
<tr>
<td>Engage and Kick Off Change Champions</td>
<td>Meet with the Change Champions as a group; explain the purpose of OCM and the Champions’ role during the RLMS implementation.</td>
<td>Initiate the Business Advisory Group</td>
</tr>
<tr>
<td>Engage Change Champion in Procurement Activities</td>
<td>Seek to include Change Champions in high-level requirements review and procurement documents review. Encourage Change Champions to listen during negotiations for the RLMS implementation vendor.</td>
<td>Engage and Kick Off Change Champions</td>
</tr>
<tr>
<td>OCM Change Champions Active</td>
<td>Change Champions become active by participating in procurement activities.</td>
<td>Engage and Kick Off Change Champions</td>
</tr>
<tr>
<td>Train Change Champions on OCM Principles and Strategy</td>
<td>Educate Change Champions on the basic principles of OCM. Provide training to Change Champions on the ADKAR® model. Provide tutorials, templates and tools Change Champions will use to carry out OCM activities.</td>
<td></td>
</tr>
<tr>
<td>Initiate OCM Activities</td>
<td>Change Champions begin delivering OCM activities with their impacted groups.</td>
<td>Train Change Champions on OCM Principles and Strategy</td>
</tr>
<tr>
<td>Conduct OCM Activities and Engage Super Users</td>
<td>Continue providing OCM activities through system implementation. Reassign Change Champions as Super Users, or recruit new department staff to act as Super Users.</td>
<td>Super User Training (see Process workstream)</td>
</tr>
<tr>
<td>Super User Post Implementation Support to End Users</td>
<td>Super Users provide field support and support for functional groups as the system goes live. Super Users continue user support until no longer needed.</td>
<td></td>
</tr>
<tr>
<td>Reevaluate OCM and Communication Strategy (Milestone)</td>
<td>Review and revise the Pre-DDI OCM and Communication Strategy for RLMS Release 1, if needed, using input from the BAG and Change Champions.</td>
<td></td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>DESCRIPTION</td>
<td>KEY DEPENDENCIES</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Update Stakeholder Analysis (Annually)</td>
<td>Work with the Change Champions and the Business Advisory Group to update RLMS Release 1 stakeholder analysis performed during Pre-DDI.</td>
<td></td>
</tr>
<tr>
<td>Refine OCM Strategy (Annually)</td>
<td>Work with the Change Champions and the Business Advisory Group to update Release 1 parts of the OCM strategy developed during Pre-DDI.</td>
<td>Reevaluate OCM and Communication Strategy</td>
</tr>
<tr>
<td>Refine Communication Strategy (Annually)</td>
<td>Work with the Change Champions and the Business Advisory Group to update Release 1 parts of the OCM strategy developed during Pre-DDI.</td>
<td>Reevaluate OCM and Communication Strategy</td>
</tr>
<tr>
<td>Establish Change Readiness Baseline</td>
<td>Undertake initial survey and analyze results to assess DOL/DOA organizational awareness and readiness to transition to RLMS, identify significant gaps and areas of focus and any adjustments needed to the OCM and training strategy / approach.</td>
<td></td>
</tr>
<tr>
<td>Assess Pre-Implementation Change Readiness (DOL)</td>
<td>Undertake second survey to assess DOL organizational awareness and readiness to transition to RLMS. Analyze the change from baseline, and identify any adjustments needed to the OCM and training activities.</td>
<td>Establish Change Readiness Baseline</td>
</tr>
<tr>
<td>Assess Post-Implementation Change Readiness (DOL)</td>
<td>Undertake final survey to assess DOL organizational awareness, analyze any remaining gaps that need to be addressed / resolved, and measure progress from the baseline</td>
<td>Establish Change Readiness Baseline</td>
</tr>
<tr>
<td>Assess Pre-Implementation Change Readiness (DOA)</td>
<td>Undertake second survey to assess DOA organizational awareness and readiness to transition to RLMS. Analyze the change from baseline, and identify any adjustments needed to the OCM and training activities.</td>
<td>Establish Change Readiness Baseline</td>
</tr>
<tr>
<td>Assess Post-Implementation Change Readiness (DOA)</td>
<td>Undertake final survey to assess DOA organizational awareness and analyze any remaining gaps that need to be addressed / resolved, and measure progress from the baseline.</td>
<td>Establish Change Readiness Baseline</td>
</tr>
<tr>
<td>Conduct Ongoing Communications and Update Communications Plan</td>
<td>Continue to provide all RLMS stakeholders with appropriate information during each phase of the project. Dynamically update the communications plan as needed.</td>
<td></td>
</tr>
<tr>
<td>Establish Change Readiness Baseline for Release 2 Divisions</td>
<td>Undertake initial survey and analyze results to assess organizational awareness and readiness to transition to RLMS for the divisions that are part of RLMS Release 2, identify significant gaps and areas of focus and any updates needed to the OCM and training strategy / approach.</td>
<td></td>
</tr>
</tbody>
</table>

**Exhibit 15: People – OCM Workstream Activity Descriptions and Dependencies**
### 4.2.3 PROCESS

The Exhibit below details all the activities and dependencies for the Process workstream.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DESCRIPTION</th>
<th>KEY DEPENDENCIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refine UAT User Training Plan</td>
<td>Finalize UAT User Training Plan, UAT scripts, plan to include Super Users, and plan to measure how users experience the new system.</td>
<td></td>
</tr>
<tr>
<td>Complete UAT (DOL)</td>
<td>DOL and other relevant stakeholder Super Users complete UAT.</td>
<td></td>
</tr>
<tr>
<td>Complete UAT (DOA)</td>
<td>DOA and other relevant stakeholder Super Users complete UAT.</td>
<td>Decide whether RLMS Service Desk will be new or part of the existing Service Desk</td>
</tr>
<tr>
<td>Plan RLMS Service Desk Process &amp; Procedures</td>
<td>Develop plans for how existing or alternate Service Desk services to support RLMS will be implemented.</td>
<td>Integration with the Operational Support Plan to be developed by the Project Team</td>
</tr>
<tr>
<td>Document RLMS Service Desk Procedures</td>
<td>Develop components of the Operational Support Plan that define how the RLMS Service Desk will function during and immediately after system implementation.</td>
<td></td>
</tr>
<tr>
<td>Develop RLMS Quick Reference Guides</td>
<td>Develop collateral for use by Service Desk, Super Users (and End Users, where appropriate).</td>
<td></td>
</tr>
<tr>
<td>Update Policies and Procedures (DOL)</td>
<td>Update DOL policies and procedures to reflect changes to be implemented as a result of using the new system.</td>
<td></td>
</tr>
<tr>
<td>Review and Refine Policies and Procedures (DOL)</td>
<td>Review DOL policies and procedures with staff and refine them as needed to reflect the most efficient processing of regulatory lifecycle activities once the RLMS has become embedded.</td>
<td>Update Policies and Procedures (DOL)</td>
</tr>
<tr>
<td>Finalize RLMS Training Plan (DOL)</td>
<td>Work with the SI to complete the DOL RLMS Training Plan, refining it to meet the training needs of the department. Specify number, type, format, mode, medium, class size, etc., for training.</td>
<td></td>
</tr>
<tr>
<td>Review and Approve RLMS Training Plan (DOL)</td>
<td>Share the Training Plan with DOL RLMS stakeholders; make needed adjustments and approve the plan.</td>
<td></td>
</tr>
<tr>
<td>Prepare and Develop RLMS Training Materials (DOL)</td>
<td>Monitor and supervise the SI as they develop the DOL RLMS training materials. Participate in the creation of materials as needed, and review and approve training materials. Involve Super Users if possible. Also develop specialized department-related training during this time.</td>
<td></td>
</tr>
<tr>
<td>Schedule RLMS Training (DOL)</td>
<td>Identify individual DOL learning profiles and schedule training (by individual) so that it may be completed no less than two weeks prior to system Go-Live. Use LMS to track progress against schedule; ensure individuals’ completion of their identified learning profile.</td>
<td></td>
</tr>
<tr>
<td>Activity</td>
<td>Description</td>
<td>Key Dependencies</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Super User Training</td>
<td>Complete Super User training several weeks before system implementation.</td>
<td>Super User Training curriculum developed</td>
</tr>
<tr>
<td>Reporting Specialist Training</td>
<td>Complete Reporting Specialist training several weeks before system implementation.</td>
<td></td>
</tr>
<tr>
<td>Complete RLMS Training (DOL)</td>
<td>Complete all mediums and modes of training for all DOL relevant stakeholder groups.</td>
<td></td>
</tr>
<tr>
<td>New Employee Training (NET)</td>
<td>Conduct RLMS training for new employees who have recently joined the division as needed. Continue new employee training as needed.</td>
<td></td>
</tr>
<tr>
<td>Conduct Refresher Training (DOL)</td>
<td>Conduct DOL refresher training just after Go-Live to address learning gaps, areas of learning difficulty, and last-minute adjustments to the RLMS.</td>
<td>Collection and analysis of training metrics</td>
</tr>
<tr>
<td>Finalize RLMS Training Plan (DOA)</td>
<td>Work with the SI to complete the DOA RLMS Training Plan, refining it to meet the training needs of the department. Specify number classes or CBTs, type, format, mode, medium, class size, etc., for training.</td>
<td></td>
</tr>
<tr>
<td>Review and Approve RLMS Training Plan (DOA)</td>
<td>Share the Training Plan with DOA RLMS stakeholders, make needed adjustments and approve the plan.</td>
<td></td>
</tr>
<tr>
<td>Prepare and Develop RLMS Training Materials (DOA)</td>
<td>Monitor and supervise the SI as they develop the DOA RLMS training materials. Participate in the creation of materials as needed, and review and approve training materials. Involve Super Users if possible. Also develop specialized department-related training during this time.</td>
<td></td>
</tr>
<tr>
<td>Schedule RLMS Training (DOA)</td>
<td>Identify individual DOA learning profiles and schedule training (by individual) so that it may be completed no less than two weeks prior system Go-Live. Use LMS to track progress against schedule; ensure individuals' completion of their identified learning profile.</td>
<td></td>
</tr>
<tr>
<td>Complete RLMS Training (DOA)</td>
<td>Complete all mediums and modes of training for all DOA relevant stakeholder groups.</td>
<td></td>
</tr>
<tr>
<td>Update Policies and Procedures (DOA)</td>
<td>Update DOA policies and procedures to reflect changes to be implemented as a result of using the new system.</td>
<td></td>
</tr>
<tr>
<td>Conduct Refresher Training (DOA)</td>
<td>Conduct DOA refresher training just after Go-Live to address learning gaps, areas of learning difficulty, and last-minute adjustments to the RLMS.</td>
<td>Collection and analysis of training metrics</td>
</tr>
<tr>
<td>Review and Refine Policies and Procedures (DOA)</td>
<td>Review DOA policies and procedures with staff and refine them as needed to reflect the most efficient processing of regulatory lifecycle activities once the RLMS has become embedded.</td>
<td>Update Policies and Procedures (DOA)</td>
</tr>
<tr>
<td>Develop Customer Awareness Strategy</td>
<td>Work with the department’s communications office, the OCM Lead, and the Training Leads to develop a list of tasks to be accomplished prior to system implementation that will promote customer and other external stakeholder awareness of the changes to expect at Go-Live. This activity may be lead from outside the RLMS project</td>
<td>Coordination with the department’s communications office</td>
</tr>
</tbody>
</table>

Exhibit 16: Process Workstream Activity Descriptions and Dependencies
### 4.2.4 TECHNOLOGY

The Exhibit below details all the activities and dependencies for the Technology workstream.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DESCRIPTION</th>
<th>KEY DEPENDENCIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defect Tracking Tool Training</td>
<td>Train Super Users and all other personnel who will support defect tracking in the proper use of the chosen defect tracking tool.</td>
<td>Defect tracking tool selected</td>
</tr>
<tr>
<td>Enable LMS for RLMS Training</td>
<td>Prepare the learning management system to deliver and track RLMS training, including loading all modules, identifying all learners, etc.</td>
<td>Decision of whether to use LMS or some other curriculum delivery system</td>
</tr>
<tr>
<td>Review Technology Logistics for RLMS CBT</td>
<td>Ensure the delivery system for RLMS CBTs has been deployed and ready for widespread use.</td>
<td>RLMS training delivery system selected</td>
</tr>
<tr>
<td>Test CBT Delivery and LMS Tracking</td>
<td>Conduct pilot or small group user test of CBT delivery and the tracking capability of the LMS.</td>
<td>RLMS training delivery system selected</td>
</tr>
<tr>
<td>Implement New End User RLMS Service Desk Capabilities</td>
<td>Operationalize and Go-Live with RLMS Service Desk for End Users.</td>
<td>Develop Customer RLMS Service Desk Strategy / Approach</td>
</tr>
<tr>
<td>Rollout Customer RLMS Service Desk</td>
<td>Begin to operate external stakeholder and customer RLMS Service Desk.</td>
<td>Decision on how external stakeholders and customers will be assisted</td>
</tr>
</tbody>
</table>

Exhibit 17: Technology Workstream Activity Descriptions and Dependencies

### 4.2.5 INFORMATION

The Exhibit below details all the activities and dependencies for the Information workstream.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DESCRIPTION</th>
<th>KEY DEPENDENCIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Change Readiness Metrics</td>
<td>Develop change readiness metrics; review and approve metrics and collection plan.</td>
<td></td>
</tr>
<tr>
<td>Establish Training Measure/Metrics</td>
<td>Develop training metrics; review and approve metrics and collection plan.</td>
<td></td>
</tr>
<tr>
<td>Track OCM and Training Metrics</td>
<td>Use LMS or alternate metrics tracking system to obtain information on change readiness and potential areas in need of additional OCM or training support.</td>
<td></td>
</tr>
</tbody>
</table>

Exhibit 18: Information Workstream Activity Descriptions and Dependencies
SECTION 5  ATTACHMENTS

5.1  ATTACHMENT I: LEARNING MATRIX


5.2  ATTACHMENT II: RLMS WORKFORCE TRANSITION / OCM TIMELINE

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160317-DACS02-D5BC-Attachment-II-WFT-OCM-Timeline-v100.vsd

5.3  WORKFORCE TRANSITION ANALYSIS (DELIVERABLE D5A)


5.4  ROLE BASED SKILLS AND GAP ANALYSIS (DELIVERABLE D5D)

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160217-DACS02-D5D-Role-Based-Skill-Assessment-Gap-Analysis-v100.docx

5.5  STAKEHOLDER ANALYSIS, OCM ASSESSMENT AND PLAN (DELIVERABLE D4A-B-C)


5.6  COMMUNICATIONS AND CHANGE PLAN (DELIVERABLE D4D-E)

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160224-DACS02-D4DE-Comm-Change-Plans-v100.docx

5.7  ENTERPRISE USE CASES (DELIVERABLE D7A)

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160226-DACS02-D7A-Use-Cases-v100.docx

5.8  UPDATED IMPLEMENTATION PLAN

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160314-DACS02-D2A-Updated-Implementation-Plan-v100.docx
5.9 RLMS GLOSSARY OF TERMS

http://floridafresh/OATS/PPMO/RLMS/Complete%20Document%20Library/160308-DACS02-RLMS-Pre-DDI-Glossary-of-Terms-v100.docx