Using the Guide

• Identify the opportunities and tools to communicate.
• Understand how to discuss change impacts to business processes and end-user roles.
• Communicate training needs and readiness activities.
Understanding Your Support

• As a manager or supervisor, you are not the only person supporting the FI$Cal Project.

• The FI$Cal Change Network provides a support structure of individuals and groups within and outside your department who are working to make the implementation of FI$Cal a success.

• The FI$Cal Change Network is made up of four groups; the first three levels support the fourth and base level, the FI$Cal End Users.

• Refer to Appendix A for additional information.
Before a Change Discussion…

• Review the Department Change Impacts Workshop presentation.
• Read through the Change Discussion Guide to understand:
  – How to conduct a change discussion, from preparation to delivery, through follow-up.
  – Escalation process for questions and concerns identified by your department.
• Work with the Department Change Champion and/or Department Liaison to identify department-specific messages and to understand the change impacts to business processes.
• Identify impacted end users and impacts specific to them.
• Participate and complete training.
During a Change Discussion...

- Use the Change Discussion Checklist and Log to guide the conversation and document decisions, results, questions, etc.
- Be positive and encourage staff member’s participation and support.
- Enlist members of the DIT or SMEs to help communicate changes and support project activities.
After a Change Discussion…

• Complete the Change Discussion Checklist and Log (Appendix B).
• Confirm that key change discussion topics were thoroughly discussed.
• Capture open/unanswered questions and concerns.
• Identify any questions or concerns (open items) requiring escalation.
  • Recommended escalation process and path are provided in Appendix C & D.
• Note any additional topics covered during the change discussion.
• Work with the Department Training Liaison to monitor the staff member’s completion of required and recommended FI$Cal end-user training.
Appendix

A – Understanding Your Support Diagram

B – Change Discussion Checklist and Log

C – Escalation Process for Questions or Concerns

D – Escalation Path for Questions or Concerns
Understanding Your Support

Change Network Structure to Support End Users

<table>
<thead>
<tr>
<th>Governance/Leadership</th>
<th>Customer Impact Committee</th>
<th>FI$Cal Steering Committee</th>
<th>FI$Cal Partner Agencies</th>
<th>FI$Cal Project Leadership</th>
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<tr>
<td>FI$Cal Project</td>
<td>FI$Cal Change Management Office</td>
<td>Sponsorship</td>
<td>Communications</td>
<td>Department Readiness</td>
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<td>Department</td>
<td>Department Sponsors</td>
<td>Department Implementation Team (DIT)</td>
<td>Department Project Manager</td>
<td>Department Liaison Network (DLN)</td>
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<td>Audience</td>
<td>FI$Cal End User</td>
<td>Department Liaison</td>
<td>Business Liaison</td>
<td>Technical Liaison</td>
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## Change Discussion Checklist and Log

### Department

<table>
<thead>
<tr>
<th>Manager/Supervisor</th>
<th>Date:</th>
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<tbody>
<tr>
<td>Meeting Logistics</td>
<td>Time:</td>
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<tr>
<td></td>
<td>Location:</td>
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<tr>
<td></td>
<td>Participant(s):</td>
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### Questions and Concerns

<table>
<thead>
<tr>
<th>Questions or Concern</th>
<th>Escalate To</th>
<th>Due Date</th>
<th>Status</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>MM/DD/YY</td>
<td>Open or Closed</td>
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### Topic Checklist

- **October 2018 Milestone 2 Changes and Impacts**
  - Summarized the Milestone 2 timeline, with an emphasis on when the end users role will change
  - Explained department-specific impacts from the Key Changes Infographic and Department Change Impacts Workshop material
    - Included reference to Milestone 2 specific processes and change impacts (referred to Key Changes Infographic and Department Change Impacts Workshop Materials)
    - Referred to University of FISCal Modules AR 124 & 126 and Job Aids for additional training, as needed

- **FI$Cal End-User Role(s)**
  - If applicable, shared the FI$Cal Deposit Slip Processor role assigned to the end user by the department
  - If applicable, reviewed the FI$Cal Deposit Slip Processor role impact to relative business process areas

- **Resources**
  - Reviewed the FI$Cal end-user training planned for the relative process areas
  - Shared the address for the FI$Cal Project website, www.fiscal.ca.gov
  - Shared relevant links to training and resources:
    3. SCO/STO Integrated Solutions Resources page: http://fiscal.ca.gov/wave_3_resources/SCOSTOIntegratedSolution.html

### Change Discussion Notes

<table>
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<th>Notes</th>
<th>[Brief description]</th>
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Escalation Process for Questions or Concerns

- During change discussions, it is expected that questions or concerns may arise that a department manager or supervisor cannot immediately address.
- The following diagram provides department managers and supervisors an option for escalating questions and concerns within their department and to the FI$Cal Project.
- Managers and supervisors should work with the Department Liaison and DIT to agree on how to raise questions and concerns within the department.
- Departments should draw from their current internal processes for troubleshooting (for example, internal Help Desk or SMEs), and the established relationship with the FI$Cal CMO Readiness Coordinator and the DIT (for example, Touchpoint meetings and email).
Escalation Path for Questions or Concerns

1. Department end user has question or concern during Change Discussion
   - Can Department Manager or Supervisor resolve?
     - Yes → Escalation Path for Questions or Concerns
     - No → Escalate to Department Liaison and/or Department Implementation Team (DIT)
   - Escalate to Department Liaison and/or Department Implementation Team (DIT)
     - Can Department Liaison or DIT resolve?
       - Yes → Escalation Path for Questions or Concerns
       - No → Escalate during Touchpoint with Readiness Coordinator or to FI$Cal CMO mailbox, fiscal.cmo@fiscal.ca.gov

   - FI$Cal Project provides response back to Department Liaison for communication within Department.

   - Question or Concern Resolved