COM Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Tisha Womack

CCN Composition	**RW Task Completeness**	**RW Task Timeliness**	**Project-led Meeting Participation**
The Change Champion Network dial reflects the completeness of your CCN makeup.	The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.	The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.	The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

• Unique Filled Role = 9

• Duplicate Filled Role = 3

• Vacant Role = 2

RW Task Completeness:

Score = 100.00%

• Submitted Complete = 1

• Submitted Incomplete = 0

• Completed After Submission = 0

RW Task Timeliness:

Score = 96.09%

• Submitted On Time = 17

• Submitted Late = 3

• Pending Submission = 0

Meeting Participation:

• Meetings Attended = 6

• Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	SME is compiling business process groupings and hopes to have complete by noon on 3/1/2024.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress		Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Dean Modling has created a cleansing plan and reviewed with Tisha Womack (Sponsor), Lemuel Toro (Agency Liaison) and myself (Project Manager) to formulate an internal plan. Clean up work has started with our Grants Management team.		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

People

Implementation:

Planned Florida PALM End Users = 44

• Business Process Groupings = 12

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 61

• Related Business Systems = 8

• Related Reports = 31

• Documentation Status:

- Complete = 18 Partial = 40 Not Started = 3

Implementation:

Impacted Agency Business Processes = TBD

Technology

Current-State:

Cataloged Business Systems = 26

• Criticality:

- High = 7 Med = 18 Low = 0 None = 1

• Documentation Status:

- Complete = 4 Partial = 22 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 23

• Segment I - Documentation Updates:

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates: TBD

Planned Interfaces = 14

- Inbound Interfaces = 1

- Outbound Interfaces = 7

Data

Current-State:

Unique FLAIR Data Elements = 71

• Associated Unique Uses = 84

- Continued Use - Yes = 2

- Continued Use - No = 12

• Associated Business Systems = 2

Cataloged Reports = 373

• Criticality:

- High = 2 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks = TBD

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

COM Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	Delegated some day-to-day activities to staff members not directly involved with PALM. This change allows CCN team members some time to work on PALM each week.	03/08/24	Caroline (Tisha) Womack / Lemuel Toro
People	SMEs who will provide vital support to PALM project during Segment IV workshops/meetings may also be needed to complete Financial Statement and Legislative Budget Request (LBR) tasks during the May 2024 - September 2024 window.	Open	6 (Medium/High)	Identify SMEs and SME backup team members.	No updates at this time.	03/08/24	Lemuel Toro / Lisa Simpson
People	Staff turnover and retention rates negatively impact Commerce's ability to gain and retain talent beneficial to PALM project and agency	Open	4 (Medium/Medium)	Leadership efforts to recruit agency resources to support Commerce business goals and PALM initiatives as needed	Ongoing risk.	02/29/24	Caroline (Tisha) Womack / Human Resources
People	Budget Chief position not filled	Closed	3 (High/Low)	Leadership will hire new Budget Chief.	Budget Chief position filled as of February 2024	02/29/24	Caroline (Tisha) Womack

COM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Insufficient work hours available to fully support Commerce specific PALM initiatives because existing staff are at capacity with regular hours	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Currently awaiting legislative budget amendment approval	Awaiting Legislative budget amendment approval	01/31/24	Caroline (Tisha) Womack (Sponsor)/ Lemuel Toro

COM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team

COM Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	Grant Listing for PALM Cleanup	01/31/24	Grants Management	Formulate plan of action to clean-up old grants	Plan discussed and pre-planned.
People Processes Technology Data	Task 504 & 505 Planning Review (PM & BL)	01/04/24	ABS/Interfaces; Commerce SMEs	Select/plan for ABS interfaces needed for Task 504 & 505	Reviewed Task 504 & 505 in Smartsheet. Formulated plan to engage other managers and gain feedback on interface selection for each area.
People Processes Technology Data	Review Payroll Wave Business Process Models	01/08/24	Finance & Accounting SMEs; HR Payroll SMEs	Discussed PALM Payroll BPM	Reviewed PALM payroll information with team.
People Processes Technology Data	Review Payroll Wave Business Process Models	01/19/24	Finance & Accounting SMEs; HR Payroll SMEs	Unpack task instructions to gain clarity on task completion requirements	Met to get progress of team.
People Processes Technology Data	Commerce Internal Clean Up Project Preplanning Meeting	01/23/24	Finance & Accounting Staff	Preliminary Clean Up Project planning	Plan discussed and pre-planned.
People Processes Technology Data	Contract Information File -- Lemuel's Office	02/05/24	Contracts Management	Discuss contract information needs & clean up tasks	Task is ongoing as part of Task 514 clean up.
People Processes Technology Data	Reconciliation Meeting (Task 514 Clean Up)	02/26/24	Finance & Accounting	Monitor/plan agreements with State Accounts	Lead SME met with team member to discuss task requirements. Task is ongoing as part of PALM Task 514.
People	PALM Weekly Update Meeting	02/07/24	Finance & Accounting	PALM project updates (current tasks & resources)	Reviewed PALM Project implementation timeline, knowledge center and other PALM specific resources, as well as high-level Commerce PALM task progress of current tasks.
People	PALM Tasks 512 - 519 Planning	02/08/24	Finance & Accounting	Identify functional/technical team members based on task requirements.	Met with Business Liaison to discuss preliminary task requirements.
People	PALM Manager's Meeting	02/08/24	Finance & Accounting Staff	Determine internal team resource needs to support Commerce Clean Up activities and, ultimately the PALM project.	CFO met with all managers to discuss critical needs of each F&A area based on time and resource allocation.
People	Grant Listing for PALM Cleanup -- Tisha's Office	02/15/24	Finance & Accounting Staff	Determine internal team resources needs to support Commerce Clean Up activities and, ultimately the PALM project.	Internal team assembled to assist in grant clean-up efforts in support of Task 514.
People	Task 512 - 515 Planning -- Lisa's Office	02/19/24	Finance & Accounting	Identify technical and other resources needed to complete task.	Met to identify necessary SMEs based on task requirements. Team also discussed preliminary meeting(s) dates.
People	Tasks 516 - 519 Kick Off	02/20/24	Finance & Accounting	Identify technical and other resources needed to complete task.	Reconvened to review task requirements and include additional SMEs.
People Processes	Review Payroll Wave Business Process Models FOLLOW UP	01/22/24	Payroll Management	Discuss PALM technical documents for current tasks	Discussed lessons learned as a result of Review Payroll Wave Business Process Models meeting on 1/8/2024.
People Processes	Grants Clean Up Team	02/16/24	Grants Management Team	Clean up old grants in preparation of transition to PALM	Small team of SMEs will work overtime to complete clean up of old grants. This work is in support of Task 514.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

[   ]

☐ **Confirm** *

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COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	03/08/24
November - December 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	01/11/24
September - October 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23