

### Helpful Links

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- Florida PALM Resources
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- Readiness Workplan

# DBPR 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

March - April 2024

### Agency Sponsor

Sally Huggins

### CCN Composition



The Change Champion Network dial reflects the completeness of your CCN makeup.

#### Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 7
- Vacant Role = 1

### RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

#### RW Task Completeness:

- Score = 66.67%**
- Submitted Complete = 2
  - Submitted Incomplete = 1
  - Completed After Submission = 0

### RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

#### RW Task Timeliness:

- Score = 89.06%**
- Submitted On Time = 20
  - Submitted Late = 6
  - Pending Submission = 4

### Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

#### Meeting Participation:

- Meetings Attended = 7
- 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
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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		Asset clean up is still ongoing, see comments in Conversion Inventory workbook. Risk is bringing in data we may not need but I'd rather continue with cleansing effort up to conversion rather than hurriedly completing cleansing now. This task is complete.		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24	sponsor unavailable		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	05/01/24	Did not have the time until today 5/1/24 to update agency risks & issues		
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	Pending Resubmission	04/19/24		Submission Incomplete	
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24	Bimonthly report submitted by due date 5/13/24; forgot to update tracker		
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

### People

The staff and stakeholders affected by your agency's transition to Florida PALM.

#### Implementation:

- Planned Florida PALM End Users = 32**
- Business Process Groupings = 13/13

### Processes

The sequence of procedures to accomplish a business objective.

#### Current-State:

- Cataloged Business Processes = 7**
- Related Business Systems = 10

### Technology

The applications or tools used to process, track, or report on financial operations.

#### Current-State:

- Cataloged Business Systems = 11**
- Criticality:

### Data

Information used in or produced from an agency's financial business operations.

#### Current-State:

- Unique FLAIR Data Elements = 84**
- Associated Unique Uses = 85

Role Mapping = TBD

Training = TBD

- Related Reports = 36
- Documentation Status:
  - Complete = 7 Partial = 0 Not Started = 0

**Implementation:**

**Impacted Agency Business Processes = 7**

- Related Business Process Groupings = 6
- Planned Spreadsheet Uploads = 0
- Level of Impact: People Changes
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- Level of Impact: Processes Changes
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- Level of Impact: Technology Changes
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- Level of Impact: Data Changes
  - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- Segments I & II Documentation Update Status
  - Not Started = 0 In Progress = 0 Complete = 0

High = 5 Med = 2 Low = 1 None = 3

- Documentation Status:
  - Complete = 10 Partial = 0 Not Started = 1

**Cataloged Interfaces = 1**

- Inbound Interfaces = 0
- Outbound Interfaces = 1

**Implementation:**

**Business Systems Planned for Integration = 1**

- Segment I - Documentation Updates:
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1
- Segment II - Documentation Updates:
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

**Planned Interfaces = 17**

- Inbound Interfaces = 7
- Outbound Interfaces = 10

Continued Use - Yes = 48

Continued Use - No = 32

• Associated Business Systems = 37

**Cataloged Reports = 55**

- Criticality:
  - High = 20 Med = 19 Low = 15 None = 0

**Implementation:**

**Configuration Workbooks**

- Segments I & II
  - Started = 0 Not Started = 9
- Conversions & Data Readiness
  - Conversions Needed = 2
  - Agency Data Outside of Primary Source System(s) = 0
- Data Readiness/Cleansing Status:
  - Complete = 1 In Progress = 1 Not Started = 0 Not Applicable 0

**Reports = 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.

#### DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Data	If we are not able to bridge the gap of institutional knowledge caused by the retirement of Accounting Systems Analyst, then details could be missed that impact DBPR's readiness	Open	9 (High/High)	Advertise position as soon as possible; hire new employee in time to overlap with retiring employee	Sessions to review Business Processes and assign applicable training have been conducted. 20240111 Work in progress to advertise John Mounts' position; new Revenue/Financial Reporting manager Lyndell Francis has started - in addition to state/accounting background, he also has IT background	01/11/24	Sally Huggins
People Processes Technology Data	Timing of Segment IV review & design workshops	Closed	9 (High/High)	Planning, planning, planning. We will need to send as many CCN and SME members as possible to make sure understanding of reviews and design is captured, but end of year finance & accounting activities take priority.	The timing and content of the Segment IV business process model reviews and design workshops is not ideal, as has been acknowledged by the project. Impacts will definitely be felt at smaller agencies, like DBPR. Escalated to an Issue.	03/08/24	Sally Huggins
People Processes Technology Data	If PALM does not provide efficient Data Warehouse tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete To Be Business Processes once we go live	Open	9 (High/High)	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps	Reached out to PALM RC to establish a game plan for mitigating this ASAP PALM Undefined To Be Business Processes and Data Repository unknown makes assessing remediation needs difficult	04/23/24	Thomas Richardson
People Processes Technology Data	If all tasks and related details are not recorded in the Project Schedule, then some tasks may slip through the cracks, and we may not be ready for PALM as scheduled	Open	6 (High/Medium)	If all tasks and related details are not recorded in the Project Schedule, then some tasks may slip through the cracks, and we may not be ready for PALM as scheduled	All current DFS PALM assigned have been assigned detailed tasks in the Project Schedule. 20240408 Project Manager is fleshing out and adding details to the Project Schedule. It is a work in progress.	04/08/24	Thomas Richardson
People Processes Technology Data	Completion of tasks	Closed	4 (Medium/Medium)	Mitigation - Work with reputable staff augmentation organizations to find experienced, qualified staff	Organizational Change Manager consultant and Project Manager Consultant have been onboarded.	04/02/24	Sally Huggins
People Processes Technology Data	If the Finance & Accounting staff's understanding of what project considers Agency Business System affects completion of tasks changes, assigned project Tasks may not be completed properly, which could impact DBPR's readiness	Open	4 (Medium/Medium)	Mitigation - Review Agency Business System information to ensure all relevant systems are included in the ABS Inventory (see Task 326, 504)	As early as Fall 2020, we were assuming everything was a business system but the guidance provided by the project at the time indicated that only systems that had a direct connection to FLAIR were considered an ABS, so we reported only very little systems. In our December 2023 Technology touchpoint,	02/29/24	Sally Huggins

						we learned that our original understanding was what the project is now considering an ABS, so we are playing catchup in identifying our AB systems.		
People Processes	If Decisions made by DBPR Leadership are not monitored and logged, then timely Decisions needed to stay on track may not be achieved	Open	4 (Medium/Medium)	Mitigation - Ensure all pending and completed Decisions are documented, tracked/managed, and recorded. Review as needed.	Project Manager has created a Decision log and is managing all Decisions on a weekly basis. These efforts appear in the Project Schedule on a weekly basis under Monitoring and Controlling.	04/08/24	Thomas Richardson	
People Processes Technology Data	If DBPR Finance & Accounting staff cannot understand To Be Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the To Be Process Flows and that could lead to incomplete work flows	Open	4 (Medium/Medium)	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)		04/18/24	Thomas Richardson	
People Processes Technology Data	If DBPR Finance & Accounting does not have someone that understands FEMA and the steps necessary to recoup expenditures, then DBPR may not be reimbursed for expenditures incurred for large DEM projects (or will receive a possible audit)	Closed	4 (Medium/Medium)	Mitigation - Ensure an OA is filed timely; work with Patty Broadway to ensure process compliance	Moved from DBPR PALM Readiness Project Risk Register to DBPR Enterprise Risk Register and will be managed there.	04/18/24	Lyndell Francis	
Processes	If we do not validate current DBPR Finance & Accounting processes as accurate and complete, then the future state (To Be) may not be accurate and efficient Open	Open	3 (High/Low)	Mitigation - Validate all current DBPR Process Flows	"Steps to review current Process Flows are under way. 20240408 OCM Manger is preparing for and coordinating related activities."	04/08/24	Gary Townsend	
People Processes	If a DBPR Finance & Accounting current state Process Flow is not mapped to its corresponding future state Process Flow, then the process owner will not be prepared for day 1 processing in PALM	Open	3 (High/Low)	Mitigation - Validate all current DBPR Process Flows	Mappings are not 1 for 1 and are difficult. Tasks have been added to the Project Schedule to track and OCM lead will address. 20240408 OCM Manger is preparing for and reviewing current state process flows.	04/08/24	Gary Townsend	
People Processes	If DBPR Finance & Accounting process owner resources are not available as needed, then the process flows may not be validated/developed, and this will impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Complete Stakeholder Register after identifying process owners and work with them to ensure availability	Staff have multiple daily responsibilities that will need to be coordinated.	04/08/24	Gary Townsend	
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners	OCM Manger is working with the Project Manager to ensure all required tasks and deadlines are entered into the Project Schedule and managed accordingly.	04/08/24	Gary Townsend	
Processes	If all new To Be Business Requirements are not captured, communicated, and reviewed by the technical team for feasibility, then DBPR future state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	See new Assumptions around RTMs and traceability. 20240408 OCM Manger is working with the Project Manager to ensure all requirements are identified and entered into the Requirements Traceability Matrix (RTM) template.	04/08/24	Thomas Richardson	
Processes	If approved DMS Rule 60GG templates and processes are not utilized/followed, then this project will be out of compliance with State regulations and is subject to a failed audit	Open	3 (High/Low)	Mitigation - Ensure all currently approved Rule 60GG templates and processes are used for this project	Project Manager has created and stored all Rule 60GG deliverable templates for the Initiation and Planning Phases.	04/08/24	Thomas Richardson	

#### DBPR 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	If Timing of Segment IV review & design workshops interferes with end of year Finance & Accounting activities, then F&A Business operations could be adversely impacted	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Planning, planning, planning. We will need to send as many CCN and SME members as possible to make sure understanding of reviews and design is captured, but end of year finance & accounting activities take priority.	The timing and content of the Segment IV business process model reviews and design workshops is not ideal, as has been acknowledged by the project. Impacts will definitely be felt at smaller agencies, like DBPR.	09/30/24	Sally Huggins

#### DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

#### DBPR 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	OCM and BPAR – Provided overview and introduced to DBPR staff OCM and Six Sigma methodologies and shared next steps to everyone to ensure proper AWARENESS as outlined in the PROSCI / ADKAR change management models and Six Sigma methodology model. (Ongoing)	04/18/24	Gary Townsend, CCN members		
People Processes Data	Conducted Transition meetings for retiring Accounting Systems Analyst	04/18/24	John Mounts, Gary Townsend, Thomas Richardson		

People Processes Technology Data	informational meeting for CCN members	03/05/24		update to CCN on tasks and readiness activities	
People Processes Technology Data	Task 521	03/11/24	Sally Huggins		completed task
People Processes Technology Data	Monthly Readiness touchpoint	03/19/24	Sally Huggins; John Mounts	Met with PALM RC's for monthly touchpoint meeting	
People Processes Technology Data	Contracted Services support began	04/02/24		Contracted services staff hired using administered funds started	
People Processes Technology Data	Participated in FL PALM Data Day Debrief session	04/02/24	All	Debrief of Florida PALM Data Day held on 3/26/24	
People Processes Technology Data	Established the official Project Name (DBPR PALM Readiness) and start and end dates	04/03/24	Sally Huggins; Thomas Richardson		
People Processes Technology Data	Established a Deliverable Tracker and documented all DBPR PALM Readiness deliverable details	04/16/24	Thomas Richardson		
People Processes Technology Data	Developed a Business Process Tracking document (includes all DBPR Business Functions, processes, Segment IDs, and mapping to PALM To Be Business Processes	04/19/24	Thomas Richardson, Gary Townsend		
People Processes Technology Data	Conducted a meeting with Project Sponsor, Project Manager, and Organizational Change Management Lead to discuss newly released PALM Tasks	04/19/24	Sally Huggins, Thomas Richardson, Gary Townsend		
People Processes Technology Data	Participated in a DBPR Working Session with the PALM Readiness Coordinator	04/22/24	Florida PALM RC's, Gary Townsend, Thomas Richardson		
People Processes Technology Data	Participated in three (3) Weekly Task Talk sessions	04/25/24	Thomas Richardson, Gary Townsend		
People Processes Technology Data	Revisited Task 328 and conducted analysis to update Business Processes and related details	04/26/24	Thomas Richardson, Gary Townsend, Sally Huggins		
People Processes Technology Data	Assigned Segment IDs to all DBPR Current-State Business Processes	04/26/24	Thomas Richardson		
People Processes Technology Data	OCM and BPAR - Scheduled and attended training sessions to transition John Mounts processes to logical personnel within DBPR (Completed)	04/30/24	Gary Townsend; John Mounts; CCN members		
People Processes Technology Data	Drafted the Work Breakdown Structure (WBS) and Project Schedule (not yet reviewed nor baselined); posted Excel and PDF weekly copies to Project Repository	04/30/24	Thomas Richardson		
People Processes Technology Data	Task 522	04/30/24	Sally Huggins		completed task
People Processes Technology Data	Completed 13 Action Items and documented in the Action Item Log	04/30/24	Thomas Richardson		
People Processes Technology Data	OCM and BPAR - Performed deep dive into DFS Florida Palm information to gain understand project scope, timelines, project tasks, Business and Systems process Changes and design of new system (Ongoing)	04/30/24	Gary Townsend		
People Processes Technology Data	OCM and BPAR – Assisted with task identification for DBPR Project Plan development. (Ongoing)	04/30/24	Gary Townsend; Thomas Richardson; Sally Huggins		
People Processes Technology Data	OCM and BPAR – Scheduled and conducted several Current State Process Flow validation sessions to ensure flows were accurate and complete and to prepare the process owners for upcoming To Be process flow analysis to ensure that the new flows (and Systems )are logical and will accomplish our processing needs, if not, we will capture our concerns and consult with team	04/30/24	Gary Townsend; CCN/SME's		
People	Task 512	03/01/24	Sally Huggins		completed task
People	Established a shared Project Repository and folder structure for all Project artifacts to be stored	04/03/24	Thomas Richardson		
People	Established and conducted Daily Checkpoint meeting with Project Sponsor, Project Manager, and Organizational Change Management Lead	04/03/24	Sally Huggins, Thomas Richardson, Gary Townsend	daily standup meetings	
People	Created and stored for use all Rule 60GG templates	04/05/24	Thomas Richardson		
People	Created other templates (Meeting Agenda, Meeting Minutes, etc.) and stored for use	04/05/24	Thomas Richardson		
People	Established and A Risk Register,	04/05/24	Thomas Richardson		

	Action Item Log, Issues Log, and Decision Log and a process for managing all RAID items				
People	Completed Rule 60GG Pre-Charter Risk&Complexity Assessment; posted to Project Repository	04/08/24	Thomas Richardson		
People	Established and conducted Biweekly DBPR PALM Readiness Project Meetings	04/10/24	CCN members		
People	Used the draft Project Schedule to manage Task activities	04/12/24	Thomas Richardson		
People	Completed Weekly Status reports and posted in the Project Repository	04/12/24	Thomas Richardson		
People	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	04/16/24	Sally Huggins, John Mounts, Lyndell Francis, Kris Burnside, Thomas Richardson, Gary Townsend		
People	Identified and documented new assumptions	04/18/24	Thomas Richardson		
People	Completed Rule 60GG Project Charter (using approved template and output from Task 500); posted to Project Repository	04/23/24	Thomas Richardson		
People	Completed Rule 60GG Stakeholder Register (using approved template); posted to Project Repository	04/25/24	Thomas Richardson		
People	Developed a tool to facilitate navigation of the shared Project Repository	04/26/24	Thomas Richardson		
People	Initiated Rule 60GG Project Management Plan (using approved template)	04/29/24	Thomas Richardson		
People	Completed Rule 60GG Initiation Gate Risk&Complexity Assessment; posted to Project Repository	04/30/24	Thomas Richardson		
People	Achieved Milestone Initiation Phase Complete	04/30/24	Thomas Richardson		
People	Identified and documented five (5) DBPR PALM Readiness Project Decisions	04/30/24	Thomas Richardson		
People	Documented, mitigated, and closed seven (7) Risks (documented in the Risk Register)	04/30/24	Thomas Richardson		

#### 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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#### DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24
November - December 2023	Tyler Russell	tyler.russell@myfloridalicense.com	01/12/24
September - October 2023	Tyler Russell	tyler.russell@myfloridalicense.com	11/09/23
July - August 2023	Tyler Russell	tyler.russell@myfloridalicense.com	09/13/23