

**Helpful Links**

- Dashboard Snapshots
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- Florida PALM Workbook for DOEA
- Readiness Workplan

# DOEA 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**

Randy Pupo

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 2
- Duplicate Filled Role = 12
- Vacant Role = 0

**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 = 100.00%**
- Submitted Complete = 8
- Submitted Incomplete = 0
- 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 = 56.88%**
- Submitted On Time = 8
- Submitted Late = 12
- Pending Submission = 10

**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 = 6
- Meetings Missed = 1

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Still working to document processes across division. RFQ in process to hire temporary staff to assist in compiling procedures and cross walking to PALM.		
	N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23					
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			Implementation schedule baseline still being constructed. PM processes in the works.		
	N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23					
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23					
	N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	25% - Beginning Initial Internal Meetings and Information Gathering		Implementation schedule baseline still being constructed.		
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	50% - In Progress		Asset and KK workbook complete. Need to meet with Budget director and RC about tree structure decision.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Working to document processes for data clean up and management of the data in the future. Due to high volume and lack of time and resources data will not be completely cleansed by 4/12.		
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		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Staff will be available mid May to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24	No business systems interacting with FLAIR.	Submission Complete	
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/25/24	Working to document processes for data clean up and management of the data in the future. Due to high volume and lack of time and resources data will not be completely cleansed by 4/12.	Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24	No interface needs.	Submission Complete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	04/12/24	Business system related, no anticipated remediation.	Submission Complete	
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/29/24	Working on reflecting current risks and issues. Staffing shortages within previous weeks caused for delay.		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24			Implementation schedule baseline still being constructed.		
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/29/24		Submission Complete	
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress		Survey has been shared with end date of May 24th. Will analyze after.		
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	25% - Beginning Initial Internal Meetings and Information Gathering		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Staff will be available mid May to compile and organize procedures in order to crosswalk to PALM processes.		

N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	04/29/24	No business systems interacting with FLAIR.	Submission Complete
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	100% - Submitted	04/29/24	No interface needs.	Submission Complete
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission		Business system related, no anticipated remediation.	
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24	Due to storm related delays task was submitted late.	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24				

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 27</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p>The sequence of procedures to accomplish a business objective.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 16</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 5</li> <li>Related Reports = 4</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 0 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 16</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 0</li> <li>Planned Spreadsheet Uploads = 0</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 0 Low = 1 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 2 Medium = 1 Low = 0 None = 0 Uncertain = 1</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 2 Low = 0 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 0 Low = 0 None = 1 Uncertain = 1</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 0</li> </ul>	<p>The applications or tools used to process, track, or report on financial operations.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 5</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 0 Med = 0 Low = 0 None = 2</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 0 Partial = 1 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 7</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 0</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> </ul> <p><b>Planned Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul>	<p>Information used in or produced from an agency's financial business operations.</p> <p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 70</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 75</b></li> <li>Continued Use - Yes = 49</li> <li>Continued Use - No = 0</li> <li><b>Associated Business Systems = 6</b></li> </ul> <p><b>Cataloged Reports = 37</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 9 Med = 3 Low = 7 None = 17</li> </ul> <p><b>Implementation:</b></p> <p><b>Configuration Workbooks</b></p> <ul style="list-style-type: none"> <li><b>Segments I &amp; II</b></li> <li>Started = 3 Not Started = 6</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 3</li> <li>Agency Data Outside of Primary Source System(s) = 0</li> </ul> <p><b>Data Readiness/Cleansing Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 0 In Progress = 2 Not Started = 1 Not Applicable 0</li> </ul> <p><b>Reports = TBD</b></p>

## 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.

DOEA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	no change to previous items	Open	6 (High/Medium)	Limited resources continue to create issues	ongoing	01/16/24	Glenn Elmer
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Review processes, look to a business system that could automate current manual processes. Could be easier to integrate the business system to Palm.	Business system has been selected and undergoing customization.	12/01/23	Glenn Elmer
Technology	lack of internal business system could result in an additional workload on an already limited staff.	Open	4 (Medium/Medium)	currently evaluating potential business systems to implement	System selected. Customization currently underway.	12/01/23	Glenn Elmer
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Medium)	As vacancies occur, targeting candidates with increased technological skills.	ongoing	12/01/23	Glenn Elmer

DOEA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Current business system is manual input. is and will continue to be a workflow issue.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	currently evaluation existing systems in other agencies. hope to be able to secure one with minimal configuration needs.	System has been selected and is currently undergoing customization	12/31/23	Glenn Elmer
People	staffing level limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.	Only \$40,000 secured. Does not provide sufficient funding to begin to address needs. Delays will result in	12/01/23	Glenn Elmer
People	Staff limitations still exist	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue to identify options. Solution has not been identified.	Issue remains	07/01/24	Glenn Elmer

### DOEA Assumptions

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

### DOEA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Data cleansing activities and the level of clean up necessary discussed within multiple areas.	03/25/24		To determine the need of various data that has accumulated in the system regarding various org codes, duplicate suppliers, etc.	Will be ongoing until final conversion
Data	Sorting through property data and beginning clean up, speaking with others involved to plan for managing the data.	04/09/24	Asset Management	Establish procedures for maintaining clean up of data	
Data	Retrieved report to identify and cleanse encumbrance data	04/05/24		Establish procedures for maintaining clean up of data	Will need to look closer at fiscal year end to ensure all CY encumbrances were closed properly
People Processes Technology Data	Meeting with PALM representative to go over overdue and upcoming tasks. Shared the extent of the workload within agency and that PALM preparation is being conducted as time allows with daily responsibilities. Discussed ways to share the workload and conversations that can be had to help complete certain tasks.	04/11/24		Sharing the risks and issues our agency is encountering when attempting to be engaged in PALM Activities.	
Processes Data	Worked with asset management to understand locations and need for location IDs. Shared recent PALM Workshop information	04/05/24		Business process changes and how they will impact his team	
People	Educated members in budget, purchasing and property management on the implementation and affect PALM will have within their units	03/14/24		Readiness of the people and how their process may change.	Ongoing and more in depth until UAT

### 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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### DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit	elmere@elderaffairs.org	03/13/24
November - December 2023	Curtis Barker	elmere@elderaffairs.org	01/16/24
September - October 2023	Curtis Barker	elmere@elderaffairs.org	11/15/23
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23