DVA 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

May - June 2024

Agency Sponsor

Al Carter

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 = 8
• Duplicate Filled Role = 13
• Vacant Role = 0

RW Task Completeness:
Score = 83.57%
• Submitted Complete = 11
• Submitted Incomplete = 2
• Completed After Submission = 1

RW Task Timeliness:
Score = 85.12%
• Submitted On Time = 23
• Submitted Late = 11
• Pending Submission = 2

Meeting Participation:
• Meetings Attended = 2
• 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	100% - Submitted	05/08/24		Submission Complete	05/30/24
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	06/28/24	ETA by July 2024.	Submission Incomplete	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	06/28/24	ETA by July 2024 - RFQ in process	Submission Incomplete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	04/29/24		Submission Complete	
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	75% - Consolidating/Inputting Information for Submission		Agency is following the timelines for requirements as posted by the PALM Executive Committee. Agency will further refine this schedule upon hiring of a Project Manager. Procurement is underway. 6/28/2024: Agency still working that though the hiring process. First vendor not qualified. Second vendor selected on or about 21 June. Awaiting funding for FY 2024/25		
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/13/24		Submission Complete	
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	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	100% - Submitted	07/12/24			
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/12/24			
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	50% - In Progress				
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/12/24		Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	50% - In Progress				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/10/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24					
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24					

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.

Implementation:

Planned Florida PALM End Users = 60

• Business Process Groupings = 12/13

Identified Subject Matter Experts = 9

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 5

- Accounts Receivable = 5

- Asset Accounting and Mgmt. = 5

- Banking = 3

- Budget Mgmt. and Cash Control = 5

- Contracts Mgmt. = 9

- Disbursements Mgmt. = 5

- Grants Mgmt. = 9

- Inter/IntraUnit Transactions = 9

- Payroll Mgmt. = 3

- Projects Mgmt. = 9

- Revenue Accounting = 5

- System Access and Controls = 5

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 102

• Related Business Systems = 2

• Related Reports = 39

• Documentation Status:

- Complete = 20 Partial = 59 Not Started = 2

Implementation:

Impacted Agency Business Processes = 102

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 102 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 100 None = 2 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 102 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 102 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 51 Complete = 34

Current-State:

Cataloged Business Systems = 2

• Criticality:

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

• Documentation Status:

- Complete = 0 Partial = 2 Not Started = 0

Cataloged Interfaces = 3

- Inbound Interfaces = 3

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 2

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Planned Interfaces = 0

- Inbound Interfaces = -1

- Outbound Interfaces = 0

Current-State:

Unique FLAIR Data Elements = 70

• Associated Unique Uses = 70

- Continued Use - Yes = 48

- Continued Use - No = 0

• Associated Business Systems = 0

Cataloged Reports = 49

• Criticality:

- High = 41 Med = 3 Low = 5 None = 0

Implementation:

Segments I & II Planned Configurations = 6/9

• Accounts Receivable (AR)

- Planned Distribution Codes = 10

• Asset Management (AM)

- Planned Location Codes = 38

- Planned Associated Area ID's = None

• Commitment Control (KK)

- Planned Option = Option # 1 - Track with Budget

• General Ledger (GL)

- Planned Budgetary Value Combo Edits = 149

- Planned Local Funds = None

- Planned Organization ID's = 28

- Planned OA1's = 14

- Planned OA2's = None

Conversions & Data Readiness

• Conversions Needed = 5

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 2 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.

DVA 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 Technology	Setup and Integration Staffing	Open	9 (High/High)	Agency is seeking to hire contract personnel to support the setup and integration of FLORIDA PALM within the Agencies overall structure. This is an unfunded mandate and the Agency critically needs these assets to support a successful transition of this system. The Agency submitted a Legislative Budget Request to secure funding mitigate this shortfall.	No subject matter expertise in local area. Agency is challenged to hire its internal staffing shortages. 8 March: Received solicitation documents from DBPR and will use them to develop solicitations for Agency. 14 May 2024: Reviewing question responses from Vendor but initial assessment is the vendor is not qualified to do the work we require.	05/14/24	Al Carter, Chief of Staff
Processes Technology	PeopleFirst Payroll integration may be impacted as we are unclear how this interface will work.	Open	6 (Medium/High)	Monitor PeopleFirst updates to ensure we can adapt to any new dependencies that may evolve.	No change. 14 May 2024: No change; monitoring continues.	05/14/24	Al Carter, Chief of Staff
People	Contracting and Procurement	Open	6 (High/Medium)	Our Agency is unique and may require system remediation as a product of implementation as our processes and procedures change as federal, state, and local statutes, laws, and administrative codes change. FDVA may have to redesign or retool existing business processes and designs. This could impact the Agency meeting its deliverables to its clients and impact the overall implementation of the project statewide.	Continuous process. Agency continues to work with FLAIR, MATRIXCARE and the like to determine if PALM will seamlessly transition these programs in part of totally based on our Agency day-to-day requirements.. Agency met with one Vendor and provided questions for validate vendors ability to perform Project Management function. Based on initial responses to questions, indications are that it is doubtful the vendor can meet Agency requirements.	05/09/24	Al Carter, Chief of Staff

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	Resources and Functionality. Full implementation simultaneously with FLAIR-end is a risky proposition given the unknown compatibility issues with other systems and business processes our Agency employs to conduct its day-to-day operations.	Open	6 (High/Medium)	Mimic FLAIR functionality exactly or as close to this standard as possible. If there are deviations from FLAIR functionality, there should be extensive retesting and training, hopefully a year ahead of implementation. Agencies are limited in staff, support and available resources for the implementation and the execution following implementation. Allowing some lead time prior to implementation to prepare may reduce inherent risks.	In progress. 14 Apr 2024: Vendor, based on questions provided may not be able to provide the assistance our Agency needs. If this solicitation is not fruitful, this will significantly impact our timeline and ability to complete required and recommended tasks.	05/14/24	Agency Fiscal, Finance & Accounting, and Billing
People Processes	Agency size and small administrative staff has a few people having multiple roles.	Open	4 (Medium/Medium)	Staff will have to be flexible and OPS personnel may be required to augment existing staff to get project implemented.	Information Technology staff working to hire personnel to work the PALM infrastructure transition while simultaneously working its telephony and network infrastructure project. 8 Mar 2024: Agency is undertaking a telephone and infrastructure upgrade simultaneously as we work through PALM integration matters, making it difficult to focus limited Information Technology resources.	03/08/24	Dr. Teresa Stillwell/Romelle Dials
People Technology	IT staff has limited knowledge of the FLORIDA PALM system and will take time to get trained up, especially given their existing Agency requirements.	Open	4 (Medium/Medium)	We will have to grow IT Staff experience as we move through the implementation process.	Ongoing. Internal staff working to learn PALM nuances on top of revamping the Agencies telephone and network infrastructure statewide, with only 9 IT personnel. Agency has drafted and will be submitting a FY 2025/26 Legislative Budget Request for additional IT personnel to support PALM integration.	04/25/24	Al Carter, Chief of Staff
Processes Data	FLAIR and FLORIDA PALM data will be different in its representation which may cause challenges when performing data analysis functions.	Open	4 (Medium/Medium)	Staff will incur extra time and possible productivity lag when trying to crosswalk and translate data.	14 May 2024. Down two key team members during this reporting period, which slowed productivity. We have no 100% dedicated assets to this project as we are one person deep in most of our functional areas and those assets must do their day-to-day job as well as work through the PALM activies.	05/14/24	Al Carter, Chief of Staff
People Processes	Staff Turnover. Agency staff turnover while decreasing, still remains over 16% in the Administrative areas mostly impacted by FL PALM.	Open	4 (Medium/Medium)	We continue to put out job announcements and canvas local colleges and universities. The respective candidates respond that State salaries are too low. We don't have to sufficient Agency budget to increase salaries to support our existing requirements, not to mention this increased workload. Reaching out to other Agencies to see what their strategies are, beyond contracting personnel.	Reached out to DoH on 7 March 2024 to determine what options they are using beyond contracting and to gain insights into the strategies they used to remediate infrastructure shortfalls. 14 May 2024: Job announcements continue to be reposted but to date, no bites in our immediate and surrounding areas.	05/14/24	Al Carter, Chief of Staff - Coordinator

DVA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Personnel to support the implementation of FLORIDA PALM within the Agencies procecesses	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request resources via the Legislative Budget Request process.	Legislative budget requests are granted at the end of the Legislative Session which occurs during the first week of May, but if approve, are effective 1 July of the next fiscal year.	08/30/24	Al Carter, Chief of Staff
People Processes Data	Submitted a contract solicitation for a Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Solicitation done week of April 17, 2024. Will hopefully select an appropriate vendor to meet Agency needs.	Only one Vendor replied to procurement, and Agency is not confident the vendor can meet Agency needs.	05/31/24	Al Carter, Chief of Staff

DVA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Funding will be approved/provided by the Florida Legislature to secure personnel needed to support the Agencies PALM transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	Requested in Agency LBR as of August 15, 2023
Technology	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	TBD after funding is secured. Procuring a vendor who can provide a Project Manager to oversee/support PALM integration O/A April 25, 2024.
People Processes Data	FDVA Executive leadership, including Project Sponsor, will support the project by providing resources, access to systems and stakeholders and by supported the organizational change management strategy created by the project team.	Logged	09/18/23	Agency wide	State provided resources, but not timely to allow Agency to secure project management and contract support staff resources. Those agencies undergoing the initial implementation were able to secure contract staff with PALM and related accounting staff. Current solicitations have yielded only one vendor, who at initial glance may not be qualified to do the work.
People Processes Technology	FDVA project stakeholders, involved parties, project team, and other involved parties will be available to provide support, feedback, and review of material to meet readiness	Logged	09/18/23	Agency wide	Missing project manager and some key IT and related accounting vendors to support this impending implementation. Working through this process.

Data	requirements and project milestones.				
People Processes Technology Data	The State level Florida PALM project team will provide key information identifying the functionality, business processes, and timeline of the larger project, in a timely manner, to facilitate timely planning and execution.	Logged	09/18/23	State and Agency implementation team.	Agency continues to work with the assigned readiness coordinator to meet tasks. Our unique functions limit the amount of assistance that Ms. Thomas can render. Hopefully with the eventual hiring of a Project Manager, we will meet deployment objectives.

DVA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

Submit

DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Alfred D. Carter	al.carter@fdva.fl.gov	06/28/24
March - April 2024	Alfred D. Carter	al.carter@fdva.fl.gov	05/09/24
January - February 2024	Alfred D. Carter	al.carter@fdva.fl.gov	03/07/24