

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for DACS
- Readiness Workplan

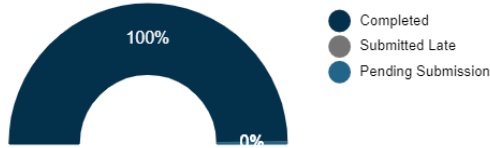
DACS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Alan Edwards

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

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

- Total Tasks = 7
- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

The dials below 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.

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 82

- Related Business Systems = 4
- Related Reports = 4
- Documentation Status:**
- Complete = 0 Partial = 82 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 46

- Criticality:**
- High = 26 Med = 13 Low = 6 None = 1
- Documentation Status:**
- Complete = 46 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

- Inbound Interfaces = 28
- Outbound Interfaces = 14

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70**
- Continued Use - Yes = 50
- Continued Use - No = 19
- Associated Business Systems = 6**
- Cataloged Reports = 198**
- Criticality:**
- High = 84 Med = 56 Low = 17 None = 51

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

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

DACS Risks

| Critical Operational Elements | Risk Description | Status | Risk Rating | Mitigation/Response Strategy | Reporting Period Comments or Updates | Date of Status Change | Owner / Coordinator |
|-------------------------------|--|--------|-------------------|--|--------------------------------------|-----------------------|---------------------|
| Technology Data | Divisions' use of existing budget codes for various purposes could increase the complexity of cross-walking/convert to the PALM data structure. | Open | 9 (High/High) | Identify opportunities for standardization to discuss with divisions during engagements related to remediation and data cleansing. Began the PALM Task 116 early. Expecting an 18-month duration for the analysis. | Ongoing | | Jim Lewandowski |
| Data | The FLAIR data and Florida PALM data will represent substantially different information and may cause a gap in trend analysis. | Open | 9 (High/High) | Detailed data crosswalks will be imperative to closing potential data translation gaps. | Ongoing | | Jim Lewandowski |
| Technology | Division applications may require more remediation than the project team can accomplish prior to the transition to PALM. | Open | 6 (Medium/High) | Begin the analysis of the Divisions earlier than planned and prioritize the Divisions that are the most likely to be impacted by PALM. Establish a communications plan with Divisions that were identified as a priority and adjust the plan as the analysis progresses using an iterative approach. | Ongoing | | PPMO |
| Technology | Unknown changes to the PeopleFirst Payroll component. | Open | 6 (High/Medium) | Monitor People First updates and the Florida PALM team to be involved in the analysis and dependencies. | Ongoing | | Jim Lewandowski |
| People | Increased vacancies with the Finance and Accounting staff as PALM approaches due to employee concerns about adapting to new processes/technology, job security, and performance. | Open | 6 (High/Medium) | Increase focus on people readiness and change management. Increase communication and training to build confidence in employees' abilities to successfully launch as an agency. | Ongoing | | Nicole Jacobik |
| Processes Technology | Short turnaround time of Florida PALM tasks (the time between the notification and description of the task and the expected task completion date) could result in the inability to | Open | 4 (Medium/Medium) | Continue to monitor Florida PALM notifications and participate with Florida PALM at every opportunity. | Ongoing | | Jim Lewandowski |

meet stated due dates.

DACS Issues

| Critical Operational Elements | Issue Description | Status | Priority | Resolution Plan | Reporting Period Comments or Updates | Planned or Actual Resolution Date | Owner / Coordinator |
|-------------------------------|--|--------|--|--|--------------------------------------|-----------------------------------|---------------------|
| People | The PALM Remediation Team has four contract vacancies | Closed | High - Impacts the ability of the agency to meet deadlines or milestones | RFOs are drafted and provided to vendors, and interviews will be scheduled. | | 10/24/23 | Khadija Harris |
| Technology | Test Database for PALM remediation is insufficient to support extensive testing activities | Closed | High - Impacts the ability of the agency to meet deadlines or milestones | Two of the planned contract services that are currently vacant, for a DBA and for Support Services, will be assigned to work on the Test Database and other environmental preparations | | 10/10/23 | Khadija Harris |
| Technology | PALM Schedule for Functional Design - leaves 1 year for major remediation | Open | High - Impacts the ability of the agency to meet deadlines or milestones | Stay current on Florida PALM RW tasks, stay informed with Florida PALM updates, and remediate as much as possible in advance. | | 12/31/25 | Florida PALM |

DACS Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments or Updates |
|-------------------------------|--|--------|------------------------|--|--------------------------------------|
| Technology | Funding for staff augmentation and services will continue through implementation and Hypercare | Logged | 08/31/23 | Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM. | |

DACS 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 | FLAIR Data Cleanup | Ongoing | Enterprise wide | To ensure clean records for current use and for conversion to PALM | Ongoing |
| Data | FLAIR Structure Moving Forward Meeting | 9/21/2023 | Business Liaisons, Technical Liaison, and SME | Meeting to discuss FLAIR coding structure (Org codes, etc.) and plan for simplifying accounting codes pre-PALM launch. | |
| Data | FLAIR Data Cleanup Planning | 9/26/2023 | Business Liaisons, SME, Project Management Liaison | Discuss planning activities involved in Data Cleanup. Approach, responsible parties, etc. | |
| Data | REV System Overview | 9/29/2023 | REV, FLAIR | Meeting to discuss REV system (Agency Business System) current functionality and future needs | |
| Data | AIMS Application Overview | 9/29/2023 | AIMS, FLAIR | Meeting to discuss AIMS system (Agency Business System) current functionality and future needs | |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/19/2023 | Division of Plant Industry Division of Food Safety Division of Agricultural Environmental Services Division of Florida Forest Service | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/20/2023 | Office of Agriculture Technology Services | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/23/2023 | Division of Licensing | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/24/2023 | Division of Marketing Division of Animal Industry | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/26/2023 | Division of Fruit and Vegetable | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/30/2023 | Division of Aquaculture Office of Energy Division of Food, Nutrition, and Wellness | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| Data | FLAIR to PALM Chart of Accounts – Division engagement | 10/31/2023 | Office of Agricultural Law Enforcement Division of Consumer Services | Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs. | Led by F&A, met with each division individually |
| People | Participated in PALM Change Management and Training Liaison Forum | 10/26/2023 | Direct: Change Management/Training Liaison Indirect: Agency-wide | Facilitate agency collaboration. Provide tools for agency change management and training plan implementation. | Addressed people-related issues, risks, and assumptions. Discussed strategies for overcoming resistance to change and embracing the PALM journey. Brainstormed communication and training format, frequency, and content (statewide and agency-specific) |
| People | OATS, F&A, Admin, and PRT Touchpoint | 9/1/2023 | Office of Agricultural Technology Services, Finance and Accounting, Administration IT, and FDACS Staff Augmentation (PRT - PALM Remediation Team) | Status reporting and reviewing risks/issues/assumptions and removing blockers | |
| People | PALM Dashboard/Bimonthly review | 9/6/2023 9/7/2023 9/8/2023 | PRT, F&A, OATS | Internal review of Bimonthly Status report/PALM Dashboard | |
| People | PALMcast Guest Speaker | 9/22/2023 | FDACS, Enterprise-wide | Discussed FDACS' approach to Organizational Change Management | PALMcast will be used in FDACS people-readiness communications and to facilitate stakeholder buy-in agency-wide |
| People | Participated in Project Management Liaison Forum | 10/26/2023 | Direct: Project Management Liaison Indirect: Agency-wide | Facilitate agency collaboration; Provide tools for agency project management | Addressed the need for Stakeholder engagement and communication. Discussed strategies for gaining stakeholders support and collaboration. |
| People | Request for Resourcing Meeting | 9/28/2023 | OATS, F&A, and Administration Leadership, Admin DIO, F&A Liaison | Meeting to discuss additional resource (people) needs for FL PALM project to meet PALM task deadlines | |
| People | FASM – Florida Administration Services | 9/29/2023 | Enterprise-wide | Business Liaison presented as guest speaker on progress with the PALM Project and FDACS approach. | |
| Processes | Process Review | Ongoing | Enterprise-wide | Ensure processes are as effective and efficient as possible for translation to PALM as appropriate | Disbursements Processes were reviewed on 10/10/23 Revenue and Grants Processes were reviewed on 10/12/23 Personnel Processes were reviewed on 10/23/23 Property Division's processes were reviewed on 11/2/23 Financial Management's processes were reviewed on 11/3/23 |

| | | | | | |
|------------|--|-------------------------|--|---|---|
| Processes | Monthly Supervisors Meeting | 9/1/2023 9/28/2023 | Finance and Accounting Supervisors | PALM Status updates, highlighted Task 328 | |
| Processes | AIMS/PALM Integration Meeting | 9/15/2023 10/13/2023 | Division of Administration (F&A, Admin DIO (IT), General Services/Purchasing, Professional and Organizational Development) | Discuss future processes for AIMS (Agency Business System) transition to PALM. | |
| Processes | PALM Task 328 - Disbursements | 10/10/2023 | Finance and Accounting Disbursements Unit, Change Management Liaison | Met with General Audit and Travel/Voucher sections to discuss Task 328 progress. | |
| Processes | PALM Task 328 – Revenue and Grants | 10/12/2023 | Finance and Accounting Revenue and Grants Management Unit, Change Management Liaison | Met with Revenue and Grants sections to discuss Task 328 progress and approach | |
| Processes | Advisory Council Meeting | 9/20/2023 10/18/2023 | Enterprise-wide | Discussed Bimonthly status report, readiness workplan, Segment I Design workshops, project costing module, and brought back key takeaways to agency stakeholders | |
| Processes | PALM Task 328 – Personnel | 10/23/2023 | Personnel, Change Management Liaison, F&A Assistant Bureau Chief | Met with Personnel to discuss Task 328 progress and approach | (Payroll processes) |
| Technology | Support Services | 9/29/2023- 6/30/2024 | PALM Remediation | PALM Remediation support for Oracle applications if vendor assistance is needed | Oracle Support hours purchased to be used as needed |
| Technology | AIMS and REV Analysis Approach | 9/21/2023 | AIMS, REV | Discuss ABS approaches for AIMS and REV between staff aug team (PRT), F&A, and high-level OATS | |
| Technology | PALM Management Touchpoint | 9/22/2023 10/27/2023 | AIMS, REV, FANS | Provide agency readiness status updates, discuss AIMS, REV, and FANS remediation, and review risks, issues, and assumptions. Discuss upcoming tasks and key takeaways from recent PALM meetings | Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB |
| Technology | REV system COA field analysis | 10/12/2023 | REV | Discussed REV (ABS) with Subject Matter Experts in ongoing FLAIR to PALM Chart of Account Analysis | Finance and Accounting Revenue Section, PALM Remediation Team, Admin DIO, OATS |
| Technology | AIMS Chart of Account Fields | 10/12/2023 | AIMS – Purchases application | Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA. | F&A, Purchasing, Admin DIO, PRT, OATS |
| Technology | PALM – Current State Overview/ Deep Dive | 10/13/2023 | AIMS, REV, FANS | Analyze current agency readiness activities and project timeline from an IT perspective | F&A, PRT, OATS, Admin DIO |
| Technology | Project Schedule Review | 10/17/2023 | AIMS, REV, FANS | Meeting to discuss project schedule implementation and timeline, key deliverables, and responsible stakeholders | F&A, PRT, Admin DIO |
| Technology | PALM Interface – Capture of Information | 10/24/2023 | AIMS, REV | Discussing process for capturing PALM interface information and related fields for remediation, document templates, folders, and retention | F&A, PRT, Admin DIO |
| Technology | AIMS Chart of Account Fields | 10/24/2023 | AIMS – Purchases, Contracts applications | Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA. | F&A, Purchasing, Admin DIO, PRT, OATS |
| Technology | AIMS Chart of Account Fields | 10/31/2023 | AIMS – Receiving, Research, Bids, Travel Applications | Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA | F&A, Purchasing, Admin DIO, PRT, OATS |

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

DACS Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|------------------------|--------------------|
| September - October 2023 | Alan Edwards | alan.edwards@fdacs.gov | 11/09/23 |
| July - August 2023 | Alan Edwards | alan.edwards@fdacs.gov | 09/11/23 |