

Task Instructions

Task ID: 569

Task Name: *Submit Bimonthly Agency Readiness Status Report*

Task Start Date: *December 30, 2024*

Task Due Date: *January 10, 2025*

Project Impact: *N/A*

Task ID: 570

Task Name: *Manage Agency-specific Implementation Schedule, Risks and Issues*

Task Start Date: *December 30, 2024*

Task Due Date: *February 28, 2025*

Project Impact: *N/A*

This document combines the task instructions for the above two tasks since the task begin and end dates for 570 - Manage Agency-specific Implementation Schedule, Risks and Issues align with the period for the next agency bimonthly report. In addition, the activities included in Task 570 should be ongoing and reported or reflected in the Bimonthly Agency Readiness Status Report (Task 569). An overview and guidance for completing both tasks is listed below.

Task Descriptions

569 – Primary Agency Sponsor to confirm and submit bimonthly status report, in the format provided by the Project, on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of Florida PALM.

570 – Actively manage your agency's project activities including iterative updates to agency-specific project schedule and manage agency-unique risks and issues.

Task Overview

Task 570: Manage Agency-specific Implementation Schedule, Risks and Issues

Project planning and management is critical to the success of any project. Agencies previously created an agency-specific implementation schedule (Task 501) and agency-specific risk and issue management plan (Task 502). This recurring task requires agencies to manage the project activities as identified and described in those project plans.

Ongoing management of the implementation schedule includes:

- Regularly monitoring the implementation schedule progress against the timeline and revising the implementation schedule to accommodate new information or changes in Florida PALM Project or internal agency requirements
- Tracking actual progress against the planned schedule and adjusting, as needed
- Regularly addressing and communicating any deviations on progress and any changes to the schedule to stakeholders

When following the risk and issues management plan, agencies should be:

- Actively identifying, managing, and reporting Florida PALM-related readiness risks (or opportunities) and issues as they arise throughout the life of the Project
- Scoring of probability and impact to risks and priority to issues
- Determining management strategies for each identified risk and resolution plans for issues
- Reporting new or updated risks and issues in the Bimonthly Agency Readiness Status Report

A confirmation column will appear each bimonthly period on the *Agency Risks*, *Agency Issues* and *Agency Assumptions* worksheets located in your agency’s *Status Reporting* folder in Smartsheet (Figure 1). Agencies must utilize this column to confirm the information for each ‘open’ risk, issue, and assumption is valid for the current reporting period.

Risk ID	Critical Operational Elements	Risk Description	Status	Impact Rating	Probability Rating	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator	Confirmed for January - February 2025
001	Technology	Grant Tracking System remediation will not be completed in time to perform testing with Florida PALM	Open	High (3) - Extensive impact	High (3) - Likely to occur often or soon	9 (High/High)	A contract amendment is being developed to update requirements (scope) to the current agreement with the vendor.	Contract amendment in progress	03/01/24	John Smith, Chief of Finance and Budget	

Figure 1: DEMO Risks Sheet in Smartsheet

NOTE: Effective for the November / December 2024 reporting period, **agencies are no longer required to report agency-specific readiness activities.** The former *Agency-Specific Readiness Activities* worksheet has been locked and moved to the *Archived* folder within the agency’s workspace in Smartsheet for reference. Agencies may choose to maintain a record of agency-specific readiness activities for internal reporting purposes outside of Smartsheet.

Task 569: Submit Bimonthly Agency Readiness Status Report

In accordance with the 2024-2025 Implementing Bill, agency Project Sponsors must provide a bimonthly status report to the Florida PALM Executive Steering Committee (ESC) providing information “on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of the Florida PALM System.”

The status report is to be submitted on a bimonthly cadence using the report template as approved by the ESC to include “meaningful information on each agency’s progress in planning for the Florida PALM Major Implementation, covering the agency’s people, processes, technology, and data transformation activities.”

An agency’s critical operational elements are defined as:

- 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 processed from an agency’s financial business operations

Agencies must complete and submit the status report in Smartsheet. Instructions for how to complete this task in Smartsheet are provided in the supplemental document found under RW Task Resources: [Guidance for Bimonthly Agency Readiness Status Report Completion](#).

To support status monitoring and reporting, each agency has a comprehensive Agency Status Report Dashboard (Dashboard) within their agency workbook in Smartsheet. The Dashboard combines agency-specific readiness risks, issues, and assumptions with a snapshot of the agency’s status across the four critical operational elements: People, Process, Technology and Data.

The data represented on the Dashboard changes based on priority activities, Project timeline, and the reporting period. The data and metrics displayed on the Dashboard are detailed in the supplemental document found under RW Task Resources: [Understanding your Dashboard](#).

How will agencies use this information?

Agencies will benefit from managing their agency-specific implementation schedule, risks and issues by:

- Planning for resources and activities needed to prepare for Florida PALM implementation
- Identifying, actively monitoring and mitigating potential risks
- Promptly identifying issues for timely management
- Reporting in the required Bimonthly Agency Readiness Status Report

Agencies can use the information in their Dashboard and process of gathering and reporting the information to:

- Support resource requests (e.g., legislative budget requests)
- Monitor their readiness progress in preparation for Florida PALM implementation
- Communicate their readiness progress and/or needs to stakeholders, such as the ESC, the agency’s CCN and agency leadership

What will Florida PALM do with this information?

The Florida PALM team will review the results of your risk or issue management activities through the review of your Bimonthly Agency Readiness Status Report. The Project will publish your Dashboard to the Florida PALM website and share with the ESC and other key stakeholders for review to satisfy the requirements of the Implementing Bill for 2024-2025. Information provided by agencies will also be summarized and discussed in ESC meetings. Information shared may result in outreach from the ESC and/or the Project team to gather more information or provide additional support.

Table 1: Task Completion Rubric

Task Completion Rubric	
Task 569	Task 570
Primary Agency Sponsor has reviewed, signed, and submitted the Bimonthly Agency Status Report.	The ‘Confirmed for January-February 2025’ column in the <i>Agency Risks, Agency Issues and Agency Assumptions</i> Status Reporting worksheets contains a checkmark for all identified Risks, Issues, and Assumptions.
	Task tracker has been marked as 100% complete.

Task Instructions

Coordinate with your agency CCN, Risk and Issue Management Team, and Implementation Schedule Coordinator for ongoing project management and to identify, log, and maintain the Status Reporting sheets in Smartsheet. These sheets are available to update at any time. Only information that has been confirmed and is relevant to the reporting period will be displayed on the Dashboard. Agency Sponsors should work with their CCN to review the Dashboard for accuracy and submit confirmation.

The Bimonthly Agency Readiness Status Report is completed in your agency workspace in Smartsheet. Your Agency Liaison and Project Management Liaison manage access to that workspace for users within your agency. Work with your CCN to ensure that Agency Sponsors have access to the workspace to complete this task.

Indicate Task 569 is complete by having your Primary Agency Sponsor submit the Bimonthly Agency Status Report and Task 570 by completing the Confirmation column in the *Agency Risks*, *Agency Issues* and *Agency Assumptions* status reporting worksheets and updating the Readiness Workplan Task Tracker to 100%.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Review and update the Status Reporting Sheets (Agency Risks, Agency Issues, and Agency Assumptions) in Smartsheet.
2) Primary Agency Sponsor must review and confirm the Dashboard located in the Agency's Florida PALM Workbook, Agency Status Reporting folder in Smartsheet by January 10, 2025 .
3) Complete the Confirmation column in the Agency Risks, Agency Issues, and Agency Assumptions worksheets located in the Agency's Florida PALM Workbook, Agency Status Reporting folder in Smartsheet by February 28, 2025 .
4) Continue ongoing project management per your agency-specific project plans throughout the next Bimonthly Agency Readiness Status Report period.
5) In Smartsheet, update the Readiness Workplan Task Tracker, Agency Reported Task Progress column for task 570, to 100% and save. This task is due February 28, 2025 .
6) Prepare to discuss your agency's progress on these tasks during monthly touchpoint meetings with your Readiness Coordinator and Technical Readiness Team.
7) If you have questions regarding these tasks, contact your Readiness Coordinator.

Supporting Materials & Resources:

- Agency-specific Implementation Schedule and Risks and Issues Management Plan
- [Guidance for Bimonthly Agency Readiness Status Report Completion](#)
- [Understanding Your Dashboard](#)
- [Risk and Issue Scoring Supplemental](#)
- [Smartsheet User Guide](#)
- [Readiness Workplan and Task Tracker Job Aid](#)