

Florida **PALM**

Planning, Accounting, and Ledger Management



EXECUTIVE STEERING COMMITTEE

WEB CONFERENCE
SEPTEMBER 12, 2019



FloridaPALM
Planning, Accounting, and Ledger Management

ROLL CALL AND OPENING REMARKS

FACILITATOR: RYAN WEST, CHAIR



REVIEW OF JULY 24, 2019 MEETING MINUTES

FACILITATOR: MELISSA TURNER



PROJECT UPDATE

FACILITATORS:

PAUL LAVERY, ANGIE ROBERTSON,
MELISSA TURNER



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Florida PALM Project Update

Staffing Update

- ▶ With the upcoming departure of the Deputy Project Director, the Project has modified the structure of the team to have two Deputy Directors, filled within current Project staff:
 - Angie Robertson's role will be expanded to include Deputy Director responsibilities for the BPS and SDS Tracks
 - Rachael Lieblich's role will be expanded to include Deputy Director responsibilities for the PMO and OCM Tracks



Florida PALM Project Update

Schedule – Ready to Start Build Go/No-Go Decision

- ▶ During the Fiscal Year planning, the Project Team identified opportunities to better align the Pilot Go/No-Go decisions with the design and organization engagement activities
- ▶ PCR-31 was logged requesting ESC approval
- ▶ The requested modifications include:
 - Changes to specified Go/No-Go Decisions' dates, names, and acceptance criteria to clearly describe what the Decision is accomplishing and include the supporting activities and deliverables
 - D127 – Production Support Strategy becomes a Written Deliverable
 - D65 – Interim Process Models and D66 – Chart of Accounts Design become Major Project Deliverables



Florida PALM Project Update

Scope – Project Change Request (PCR)

- ▶ PCR-32 was logged requesting approval by the Project Director
- ▶ The requested modifications include:
 - Changes to deliverable names to avoid confusion between system recovery and disaster recovery terminology
 - Changes to deliverable acceptance criteria to require the impacted deliverable contains specific information needed to support the purpose of the deliverable
 - Establishes eleven new work products to track the completion of planned activities



Florida PALM Project Update

Scope – Solution Design

- ▶ Standardized Business Process Model update
- ▶ Process and Transaction Mapping and Analysis updates include:
 - Departmental FLAIR transaction codes identified during the July 24 ESC meeting, as well as additional codes
 - Language based on feedback received from additional Pilot organizations asked to review
 - Minor edits or clarification






INDEPENDENT VALIDATION AND VERIFICATION (IV&V)

FACILITATOR: MARK FAIRBANK



IV&V Assessment

July 2019 Reporting Period

Overall Status			
Current Period	Prior Period	Overall Trend	Observations Based on standardized IV&V scoring
			<ul style="list-style-type: none"> The DDI Phase continues to progress according to plan. Detailed planning activities involve rescheduling of multiple activities to occur earlier than originally planned. Resource allocation is monitored closely by Track Managers and PMO. Rescheduling requires Accenture to accelerate staffing. Risks and Issues are being managed proactively and with a reasonable sense of urgency. PMO demonstrates consistent and strong cost management practices. Quality control, financial control, and vendor processes are established and consistently executed. The Project regularly conducts proactive communications to stakeholders. Collaboration between the State Project Team and Accenture Team continues to produce mutually satisfactory results. The IV&V Team has identified no significant risks to DDI Phase activities. The Project trend is stable as work toward producing deliverables is proceeding according to plan with some schedule variation that presently does not affect milestones.



IV&V Assessment

Additional Observations

- ▶ Overall, with very few exceptions, IV&V continues to observe the Project producing work products and deliverables on schedule
- ▶ The Project is focusing on addressing key dependencies on interfaces/data exchanges with FFMS partners and aligning to the current schedule
- ▶ Efforts are also concentrated on the completion of interim solution analysis to confirm and provide essential information to DFS operations, FFMS partners, and all state organizations
- ▶ The definition of interim processes will identify some but not all potential modifications to FLAIR; the complexity of this undertaking is mutually understood to be very high



IV&V Assessment

Process and Transaction Mapping Analysis

- ▶ It is rare for this type of analysis to be elevated to the level of a discrete deliverable and be completed at this point in the project
 - It is more commonly something that is produced nearer to implementation to facilitate change management and training activities
- ▶ The benefits of completing this earlier are apparent:
 - Improve conceptual agreement between Accenture and State on how the Florida PALM will fulfill business needs
 - Provide the Readiness Team with context and knowledge needed to interact effectively with agencies
 - Inform test plans and scenarios to ensure testing activities at each cycle are as comprehensive as needed
- ▶ The definitions contained in document are thorough and helpful to understanding:
 - How Florida PALM functions account for FLAIR and CMS functions
 - The relationship of Florida PALM functions to the overall business process



VOTING ACTION

FACILITATORS:
RYAN WEST, MELISSA TURNER



Voting Action

- ▶ Request for public comment
- ▶ Major Project Deliverable: Process and Transaction Mapping Analysis
- ▶ PCR #31



UPCOMING

MELISSA TURNER



Florida PALM Project Update

Upcoming

- ▶ Statutory Changes to implement Florida PALM
 - Directs development with ESC of final recommendations for any statutory changes needed to implement the replacement system
 - Also directs DFS to draft legislation for any statutory changes needed to implement the replacement system
 - Requires submission of ESC recommendations to the House, Senate, and Governor's Office by November 1, 2019
- ▶ Change Champion Network Townhall with all organizations
- ▶ Chart of Accounts Design working meetings



NEXT MEETING

SEPTEMBER 25, 2019
DOR, BUILDING 2, ROOM 1250



CONTACT INFORMATION

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