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Planning, Accounting, and Ledger Management Project

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Monthly Assessment Report
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Table of Contents

Table of Contents.....	2
Executive Summary	4
Focus Area Updates	4
New Findings	11
Open Findings.....	13
Closed Findings	17
Metrics Related to Findings.....	17
Florida PALM Project Focus Area Updates	18
Florida PALM Agency Focus Area Updates	34
Key Metrics or Analysis.....	39
IV&V Information Requests.....	58
Appendix A – Risk Priority Matrix	59

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Executive Summary

The following list summarizes the key items the Florida PALM IV&V Team details in the Monthly Assessment Report for November 2024:

- The overall Florida PALM Project Risk Rating remains a High Risk due to new Findings 16 and 17 regarding preliminary concerns about the delays to Mock Conversion and the overlapping timelines for Training, User Acceptance Testing (UAT), and Year-End Closing (YEC) activities for the Agencies, the declining Risk Ratings for the Organizational Change Management (OCM), Development, and Data, Conversion, and Interfaces Focus Areas, and the continued high failure rate of Reports, Interfaces, Conversions, Extension, Forms, and Workflow (RICEFW)-related Test Scripts (Finding 15).
- The Florida PALM IV&V Team has opened a new Finding (Finding 16) based on a preliminary concern regarding the compounding delays in Mock Conversion 0 and 1, which has led to a compressed timeline for Mock Conversion 2 and has the potential to impact multiple downstream activities, such as Interface testing, future Mock Conversions, and UAT.
- The Florida PALM IV&V Team has opened a new Finding (Finding 17) based on a preliminary concern that the overlapping timing of UAT, Training activities, and YEC tasks has the potential to create resource constraints, increase SME and end-user change fatigue and burnout, and reduce the effectiveness of Training delivery.
- The Risk Rating for the Development Focus Area remains High Risk. Delays in Build Segments III and IV are expected to affect the timely completion of System Testing and pose a risk to meeting Stage Gate 3 – Ready to Begin UAT.
- The Risk Rating for the Data, Conversion, and Interfaces Focus Area remains a Medium Risk due to Mock Conversion 0B and 1B delays.

Focus Area Updates

The table below summarizes the Florida PALM IV&V Team's updates for the various focus areas since the last monthly assessment report. Detailed updates regarding these focus areas are provided in this document's Focus Area Updates section. Some focus areas may be marked as Not Applicable (NA) as they have not started or if there is no significant activity during this reporting period. Descriptions for each Focus Area will be incorporated into each Monthly Assessment Report.

Florida PALM Project Focus Areas

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Overall Project Indicator	High	High	Declining	<p>The overall Florida PALM Project Risk Rating remains a High Risk due to new Findings 16 and 17 regarding preliminary concerns about the delays to Mock Conversion and the overlapping timelines for Training, UAT, and Year-End Closing YEC activities for the Agencies, the declining Risk Ratings for the OCM, Development, and Data, Conversion, and Interfaces Focus Areas, and the continued high failure rate of RICEFW-related Test Scripts (Finding 15).</p> <p>Delays in Build activities are impacting critical Florida PALM Project areas, including Interface Testing, Mock Conversion, and Training. The Florida PALM Training Team, which relies on screenshots generated during System Testing execution for developing certain Training materials, has been affected by the delayed release of some RICEFW Items. These delays have postponed the execution of related Test Scripts, impacting the availability of screenshots and necessitating adjustments to the Training timeline and strategy.</p> <p>The schedule outlined in the Deliverable Expectation Document (DED) for D654 – Completion of Build Segment IV shows that the final RICEFW-related Application Development (AD) documents will not be approved until mid-March. As a result, approximately 90% of the RICEFW Items planned for execution in the final Cycle of System Testing will not be ready at the beginning of that Cycle. Coupled with the continued high failure rate of RICEFW-related Test Scripts and the need for repeated executions to achieve successful results, this delay will impact the System Testing timeline, leading to an increased overlap with UAT or delaying the start of UAT.</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Florida PALM Project Management	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>The Schedule Performance Indicator (SPI) has increased to .92. This indicates that the Florida PALM Project is progressing slightly behind the planned pace.</p> <p>The number of Delayed tasks has decreased from 375 in October to 300 in November. These delays primarily pertain to D649 – Completion of Build Segment III, Work Product (WP) 408 – System Test Scripts, and Internal Work Products (I-WPs) for Training.</p> <p>Considering the complexity of the Florida PALM Project and the ongoing delays across multiple phases, the Florida PALM IV&V Team recommends that the Florida PALM Project Team conduct a comprehensive risk assessment to confirm that risks are being identified promptly and that mitigation strategies are effective and proactive.</p>
Florida PALM Organizational Change Management	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Readiness Coordinators (RCs) have engaged Agencies through workshops, meetings, and routine touchpoints focused on Interface Testing, UAT, and Training. The evolving Florida PALM Project Training Strategy now emphasizes UAT as the primary training mechanism. The potential cancellation of the Train-the-Trainer (TTT) Program will require clear communication with the Agencies. The Florida PALM IV&V Team recommends that the Florida PALM Project Team finalize a decision regarding the TTT Program and reinforce UAT as the primary training approach with the Agencies.</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Florida PALM Requirements and Design	Low	Low	No Change	<p>The Risk Rating for this Focus Area remains a Low Risk.</p> <p>The Florida PALM IV&V Team will monitor future design efforts associated with PCR 121.</p>
Florida PALM Development	High	High	Declining	<p>The Risk Rating for this Focus Area remains a High Risk. Delays in Build Segments III and IV are expected to affect the timely completion of System Testing and pose a risk to meeting Stage Gate 3 – Ready to Begin UAT.</p> <p>While all Build Segment III AD documents have been drafted, 81 of the 123 AD documents have been approved as of 11/30/24. All AD documents were originally targeted for approval by 9/27/24.</p> <p>The Draft DED for D654 – Completion of Build Segment IV outlines a schedule for Build Segment IV activities, indicating that the final Build Segment IV AD documents are anticipated to be approved by 3/18/25. This reflects a delay of approximately 9 weeks from the targeted completion of Development.</p>
Florida PALM Testing	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>System Testing has been executed for Cycles 0-3 as per the Test Execution Tracker (TEXT). Additional Test Scripts for Cycles 2-3 have been documented in the Test Script Work Unit Tracker (TSWUT) and the WP408 folder on the DFS SharePoint, indicating that these Test Scripts may be executed in future Testing Cycles and/or Segments. No test execution has been recorded in the TEXT after 11/14/24, which aligns with the completion of Testing Segment I in the Florida PALM Project Schedule.</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Florida PALM Data, Conversion, and Interfaces	Medium	Medium	Declining	<p>The Risk Rating for this Focus Area remains a Medium Risk due to delays to Mock Conversion 0B and 1B.</p> <p>Mock Conversion 0B for Financials and Payroll is behind schedule, with four of the eight Conversion interfaces completed and four still in progress. Mock Conversion 1B began in November, but its completion is dependent on the successful completion of Mock Conversion 0B. While similarities between Mock Conversion 0B and 1B may help the Florida PALM Project Team make up some of the delayed time, the unresolved High and Medium-priority SIRs may impact future Mock Conversions, Interface Testing, and UAT. The Florida PALM IV&V Team has opened Finding 16 to document the risk these delays pose to the Florida PALM Project timeline and to track timely resolution.</p>
Florida PALM Implementation Readiness	NA	NA	NA	The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

Table 1: Florida PALM Project Focus Areas

Florida PALM Agency Focus Areas

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Agency Project Management	NA	Medium	NA	<p>The Risk Rating for this Focus Area is a Medium Risk.</p> <p>The Florida PALM IV&V Team has observed resource constraints among the Agencies, with Change Champion Network (CCN) members handling multiple roles and some Agencies struggling to meet the Readiness Workplan (RW) Schedule for Tasks that have a Direct Impact on the Florida PALM Project.</p> <p>In November, the total number of Agency Open Issues and Risks increased. Many of these Risks and Issues lack sufficient documentation and proper prioritization.</p>
Florida PALM Agency Readiness	NA	Medium	NA	<p>The Risk Rating for this Focus Area is a Medium Risk.</p> <p>In interviews with the Florida PALM IV&V Team, Agencies have expressed concern about the overlap between UAT, Training activities, YEC activities. Based on the growing trend that many of the Agency Subject Matter Experts (SMEs) will be responsible for conducting UAT, developing Training materials, and handling YEC operational tasks, the Florida PALM IV&V Team has opened Finding 17. This finding highlights how the overlap may lead to resource constraints, change fatigue, burnout, and affect the effectiveness of Training delivery.</p>
Agency Requirements and Design	NA	NA	NA	<p>The Florida PALM IV&V Team has no update for this Focus Area. The IV&V Team will continue to observe and provide updates in future reports as identified.</p>
Agency Testing	NA	NA	NA	<p>The Florida PALM IV&V Team will begin reporting progress once Agency Testing efforts begin.</p>

Agency Data, Conversion, and Interfaces	N/A	Medium	NA	<p>The Risk Rating for this Focus Area is a Medium Risk.</p> <p>In interviews with the Florida PALM IV&V Team, Agencies have expressed confusion and concern regarding the Interface Tasks, the final of which is due 12/13/24. Since incomplete or delayed Interface Tasks could affect the Interface Testing timeline and Agencies' readiness for UAT, the Florida PALM IV&V Team will cross-reference these Agency-reported challenges with information available in the Florida PALM Knowledge Center and Agency Smartsheets.</p>
Agency Implementation Readiness	NA	NA	NA	<p>The Florida PALM IV&V Team will begin reporting progress once Agency Implementation efforts begin.</p>

Table 2: Florida PALM Agency Focus Areas

New Findings

Finding Type: Preliminary Concern

Impact: Significant

Probability: Likely

Priority: High

Finding # and Title: **Finding 16** – Compounding delays in Mock Conversion 0 and 1 have led to a compressed timeline for Mock Conversion 2 and have the potential to impact multiple downstream activities, such as Interface testing, future Mock Conversions, and UAT.

Finding Description: Mock Conversion 0B has been delayed due to delays with the development of critical Payroll Conversion interfaces, pushing the anticipated completion date of Mock Conversion 0B beyond November. As of 11/30/24, the Florida PALM Project Team completed Conversion activities for 10 out of the 14 interfaces for Mock Conversion 0B. Three of the remaining Conversion interfaces are 50% complete and one is 25% complete. Additionally, there are two open High-priority SIRs with one remaining unresolved since October, and 10 Medium-priority SIRs. These delays have pushed the completion of Mock Conversion 1B to early December, but Mock Conversion 1B cannot be finalized until Mock Conversion 0B is complete.

Mock Conversion 1A is complete, though there are two open High-priority SIRs and seven Medium-priority SIRs that remain unresolved, with one High-priority SIR relating to a performance issue dating back to October. These incomplete Conversions and unresolved SIRs may delay Mock Conversion 2, which involves similar Conversion files with additional data, and impact other downstream Florida PALM Project activities.

Criteria: To maintain the current Florida PALM Project timeline, the remaining testing activities for Mock Conversions 0 and 1 must be executed, and all High and Medium-priority SIRs resolved. Since Mock Conversion 2 uses the same files as these cycles with added data, timely resolution of SIRs is critical to prevent delays in downstream activities, including Interface Testing, subsequent Mock Conversions, and UAT.

Cause: Delays stemming from challenges regarding the development of key Payroll Conversion interfaces have caused the Mock Conversion 0B timeline to extend into November, resulting in a backlog of unresolved defects and impacting the completion of Mock Conversion 1B on time.

Effect: The delays in Mock Conversion 0B have pushed the completion of Mock Conversion 1B into December, which may impact the Florida PALM Project Team's ability to provide the converted files back to the Agencies for review and correction before Mock Conversion 2 begins. While Mock Conversion 2 can begin on time since not all files are delayed, late completion of Mock Conversion 2 could affect subsequent activities such as Interface Testing, Mock Conversion 3, and UAT.

Recommendations: The Florida PALM IV&V Team recommends prioritizing the resolution of SIRs from Mock Conversions 0B and 1B and finalizing Mock Conversion 0B activities to prevent further delays to Mock Conversion 1B. The Florida PALM Project Team should review completion dates for the remaining Mock Conversions and consider mitigation strategies such as allocating additional resources or extending work hours to realign the Mock Conversion timeline and promptly address new SIRs.

Finding Type: Preliminary Concern

Impact: Significant

Probability: Likely

Priority: High

Finding # and Title: **Finding 17** – The overlapping timing of UAT, Training activities, and YEC tasks can create resource constraints, potentially reducing the effectiveness of Training delivery.

Finding Description: Agency SMEs and end users will depend on UAT and Training to gain the familiarity needed to perform their job functions in Florida PALM. The concurrent timelines for UAT, Training, and YEC activities may strain Agency resources and divide their focus across these overlapping efforts.

Criteria: The Project Management Body of Knowledge (PMBOK) and the Institute of Electrical and Electronics Engineers (IEEE) contain guidelines that outline best practices for managing UAT and Training as distinct phases within the Software Development Life Cycle (SDLC). These standards emphasize completing UAT sequentially before finalizing Training materials to minimize rework and confusion.

Cause: Agency SMEs will lead the initial phase of UAT from mid-April to September 2025 and assist in developing Agency-specific Training materials from July to November 2025 while generic Florida PALM Training is occurring. YEC activities for Agencies will begin in June 2025 and run for several months.

Effect: The overlapping timing of UAT, Training activities, and YEC tasks could create resource constraints, limiting the availability of Agency resources for performing UAT and end-user training. At a minimum, this could reduce the effectiveness of Training delivery, potentially impacting end users' ability to perform critical job functions in Florida PALM.

Recommendations: The Florida PALM IV&V Team recommends that the Agencies plan to increase resources - through staff augmentation or via other resources - to better support their staff during these parallel activities before beginning UAT. The Florida PALM IV&V Team also recommends that the Florida PALM Project Team track Training readiness through defined KPIs, surveys, and other metrics (i.e., SME and end-user participation in UAT, UAT progress, Training participation, completion rates, and knowledge transfer evaluations).

Additionally, the Florida PALM Project Team may consider implementing additional support mechanisms during this period, such as setting up support labs, offering office hours, and continuing to host targeted workshops to address learning gaps and technical issues during UAT and Training. While the Florida PALM Project Team is already considering some of these measures, they could be more effectively defined through early engagement to identify specific Training needs and gaps, which can then be incorporated into the Training materials.

Open Findings

Finding # and Title: **Finding 14** – Risk that Delays in Application Build Could Impact Completion of System Testing and the Start of UAT.

Date Opened: 3/29/24		
Finding Description: At the time Finding 14 was opened, Build Segment I activities were seven weeks behind schedule, and Build Segment II was approximately three weeks behind schedule. There was a risk identified by both the Florida PALM IV&V Team (Finding 14) and the Florida PALM Project Team (Risk #8) that if these delays continued into subsequent Build Segments, the completion of System Testing or Stage Gate 3 – Ready to Begin UAT could be affected. Since Build Segments III and IV involve more Development activities than Segments I or II, ongoing delays could have a much larger and cumulative impact on the subsequent Build Segments.		
Current Impact: Significant	Previous Impact: Significant	Trend: Declining
Current Probability: Likely	Previous Probability: Likely	Trend: Declining
Current Priority: High	Previous Priority: High	Trend: Declining

Status Update: While all Build Segment III AD documents have been drafted, 42 have not been approved as of 11/30/24. All the AD documents were targeted to be approved by 9/27/24. Additionally, based on the draft DED for D653 – Completion of Build Segment IV, the final Segment IV AD documents will not be approved until 3/18/24. This is approximately nine weeks later than originally planned. The delay in Build Segment IV is expected to impact the completion of System Testing since the last Cycle of System Testing is expected to begin on 3/3/25 with approximately 10% of the RICEFW Items planned for testing available at that time. This delay may also push back Stage Gate 3 – Ready to Begin UAT. Additionally, the delays in Build have impacted the completion of Mock Conversions and the start of Interface Testing Cycle 2.

Recommendation Updates:

Recommendation #1: The Florida PALM SSI Vendor should re-evaluate and update the Staffing Plan to demonstrate how offshore and onshore Development staff will be adjusted to accommodate the increased scope and complexity of subsequent Application Build Segments.

Status: In Process

Update: Since June 2024, the SSI Vendor has consistently been adding additional Development staff to mitigate delays in Build. Initially, the increased Development staffing did not appear to significantly impact the pace of Build. Starting in October, there was a measurable increase in the pace of drafting AD documents. Since Build Segment IV has just begun, the Florida PALM IV&V Team does not have enough data to determine the impact the additional Development staff may have on the final Development segment.

Recommendation #2: The Florida PALM Project Team should review and reassign Application Design review activities, when possible, to other staff that are not also supporting Segment IV Design or other overlapping activities.

Status: In Process

Update: The Florida PALM Project Team has made efforts to shift review responsibilities to other staff or contractors when possible. Due to the expertise and prior knowledge gained from working on FDs, this approach has not been consistently feasible.

Recommendation #3: The SSI Vendor should continue with the current approach to providing existing functional resources to work with the Development team to clarify the FDs.

Status: In Process

Update: At the start of each Build, the Development team conducts a pre-build meeting with the Florida PALM Project Team and SSI Vendor functional staff to review the FDs and clarify questions about the Design. Additionally, the Florida PALM Project Team has been diligent in reviewing the AD documents when they are available but multiple rounds of review to clarify or correct content have been needed prior to approval.

Finding # and Title: **Finding 15** – Risk That High Failure Rate For RICEFW-Related Test Scripts May Impact Stage Gate 3.

Date Opened: 10/31/24		
Finding Description: Although System Testing execution is progressing, the Florida PALM IV&V Team has identified an initial failure rate of approximately 76% for Test Scripts associated with the RICEFW Items. As of 10/31/24, the failure rate for the second and third runs for RICEFW Items that failed initial execution is also high, with 30% failing during the second run and 38% failing on the third run. When compared to other types of Test Scripts, the failure rate of RICEFW-related Test Scripts for first, second, and third runs is substantially higher.		
Current Impact: Significant	Previous Impact: Significant	Trend: No Change
Current Probability: Likely	Previous Probability: Likely	Trend: No Change
Current Priority: High	Previous Priority: High	Trend: No Change

Status Update: The initial failure rate for RICEFW-related Test Scripts remains high. As of 11/30/24, approximately 73% of these Test Scripts failed the initial test run. Of those, 34% also failed the second run. The number of open High-priority SIRs has remained steady, but the number of Medium-priority SIRs has been increasing. Additionally, 62.5% of SIRs are identified as “coding” defects, meaning developers will need to address them. These trends suggest that more development effort will be required to resolve the SIRs, potentially causing further delays in completing remaining Build activities or passing Test Scripts.

Recommendation Updates:

Recommendation #1: Prioritizing the resolution of SIRs by the Development staff that built the failed RICEFW Item.

Status: In Process

Update: Based on a review of Developers assigned to correct SIRs, it does appear that most are being assigned back to the original Developer.

Recommendation #2: Adding additional Development staff to focus on the remaining items for Build Segment IV.

Status: In Process

Update: Additional Development staff have been added to the Florida PALM Project starting in June and additional staffing is expected through February 2025.

Recommendation #3: Prioritizing Test Scripts to ensure the most critical business functionality is tested as soon as possible.

Status: In Process

Update: Test Scripts are being prioritized and coordinated with the Development team based on what is available.

Recommendation #4: Documenting and standardizing approaches to maintain consistency in configuration, application security roles, and settings across different environments.

Status: In Process

Update: Improvements have been made to the deployment process to make them more consistent. During November, approximately 2% of SIRs were identified as a "migration" defect type.

Recommendation #5: Enhancing smoke testing performed on Builds migrated to the System Testing environments using automated Test Scripts.

Status: No Change

Update: Although some smoke testing is performed, the Florida PALM IV&V Team is not aware of any increase in the smoke tests being performed or that any of the tests are being automated.

Recommendation #6: Continuing existing meetings and processes between Development and Testing teams to coordinate the availability of RICEFW Items for System Testing, and to identify and manage any dependencies among RICEFW Items.

Status: In Process

Update: The Florida PALM SSI Vendor Development and Testing Teams are in frequent contact to coordinate testing of RICEFW Items based on availability. The Florida PALM IV&V Team has not observed any instances where testing was attempted on a RICEFW Item that had not been completed.

Recommendation #7: Continuously logging and reviewing root causes of SIRs with testers to minimize future identification of SIRs that are not valid defects.

Status: No Change

Update: Root causes are not consistently being logged for SIRs and, therefore, cannot be used to analyze if SIRs are truly valid defects.

Recommendation #8: Developing a burn up chart based on the Stage Gate 3 Entry Criteria and tracking performance against it.

Status: No Change

Update: The Florida PALM IV&V Team has not observed the creation and maintenance of a burn up chart based on the Stage Gate 3 criteria that can be used to determine if the trajectory of progress is sufficient to meet the criteria.

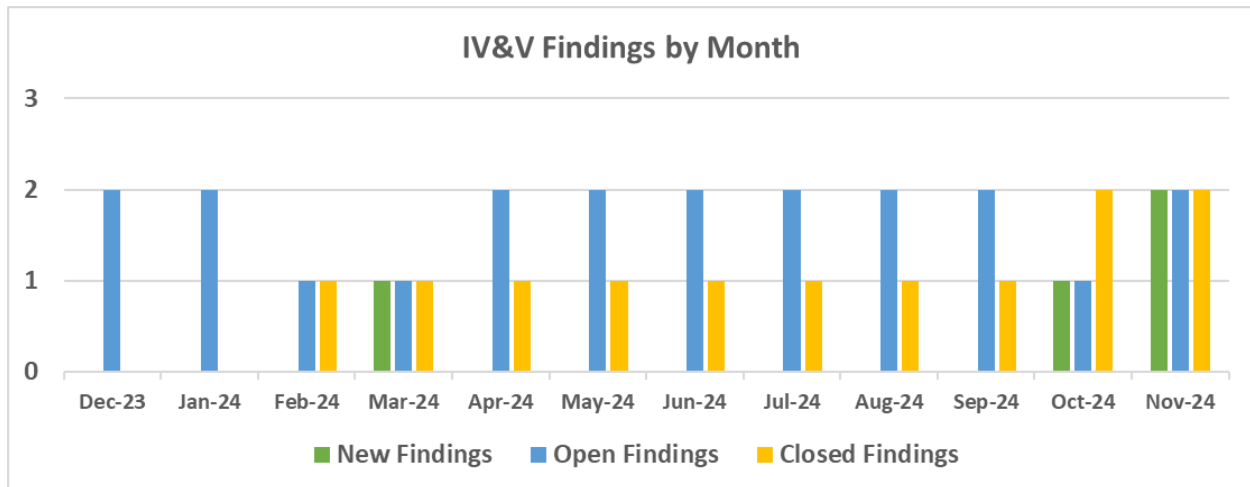
Closed Findings

No findings were closed in this reporting period.

Metrics Related to Findings

The Figure below shows the open, closed, and new Findings identified by the Florida PALM IV&V Team. Currently, two new Findings were opened this month. There are also two open Findings and two closed Findings.

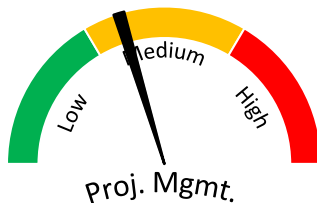
Figure 1: Florida PALM IV&V Findings by Month



Florida PALM Project Focus Area Updates

Florida PALM Project Management

Focus Area Indicator¹



Trend: No Change

Florida PALM Project Management Updates

The Florida PALM IV&V Team monitors changes to the SPI and Delayed tasks on the Florida PALM Project Schedule to assess the effectiveness of the Florida PALM Project Team's task management processes and evaluate the overall health of the Florida PALM Project. SPI measures how efficiently the Florida PALM Project is progressing relative to the planned schedule, while Delayed Tasks highlight specific areas where the Florida PALM Project may be experiencing roadblocks or potential issues. The Florida PALM IV&V Team uses Steelray Project Analyzer to calculate the SPI and Delayed Tasks based on the End of Month (EOM) Florida PALM Project Schedule.

Florida PALM Project SPI

Utilizing the Florida_PALM_Project_ScheduleEOM.mpp file with a status date of 11/30/24, the Florida PALM Project Schedule SPI saw a slight increase from .91 in October to .92 at the end of November. An SPI of .92 indicates that the Florida PALM Project is progressing at 92% of the planned pace, which is slightly behind schedule.

Florida PALM Project Delayed Tasks

The number of delayed tasks on the Florida PALM Project has decreased by approximately 19% since October, with 300 delayed tasks recorded at the end of November as opposed to 371 at the end of October. Steelray defines a Delayed task as one that should have started or finished but has yet to be completed. The Florida PALM IV&V Team has grouped these tasks into the following categories:

- Configuration.
- Deliverables.

¹ Indicator would include this month's indicator as well as a shadow that shows what the previous indicator rating was similar to what is provided in the current monthly assessment report template.

- Administrative (Admin), tasks that support the Florida PALM Project but do not affect the Critical Path (e.g., reporting tasks, audits, budget tasks, documenting Florida PALM Project metrics).
- Work Products (WP).
- Internal Work Products (I-WP).
- Work Product Expectation Documents (WPED).

The Figure below shows the breakdown of these tasks. The biggest decrease can be seen in the Deliverables Category.

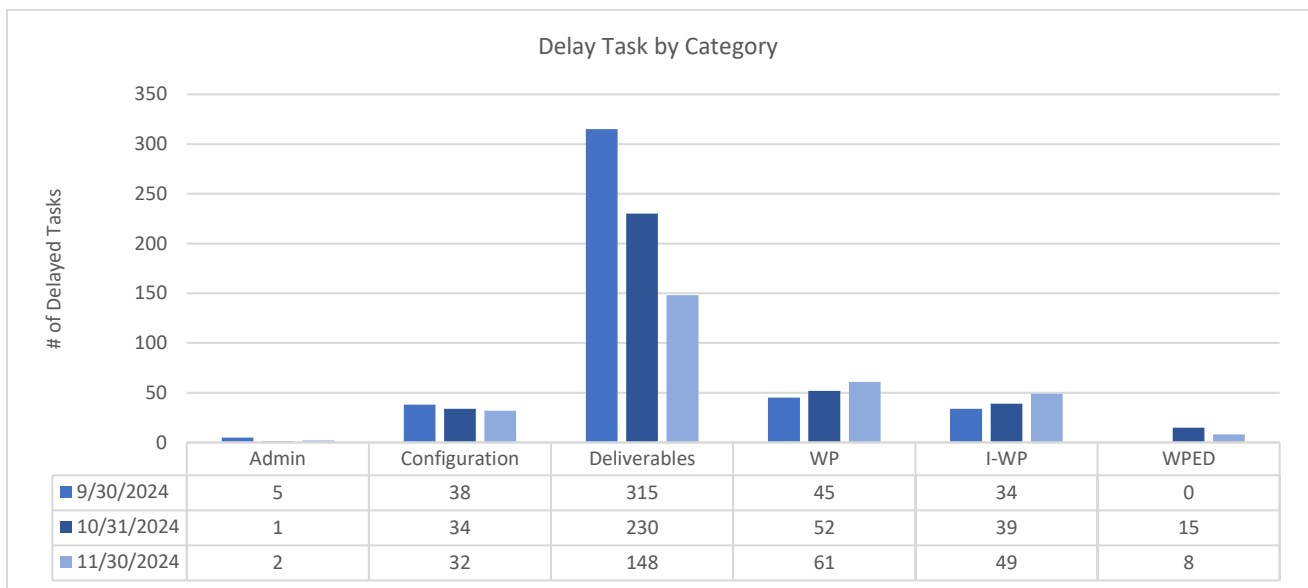


Figure 2: Delayed Tasks by Category

D649 – Completion of Build Segment III continues to have the highest number of Delayed tasks, although there has been a reduction in their count. The delays are primarily due to the need for multiple rounds of updates to AD documents based on feedback and clarifications and underestimating the scope of complexity of the remaining Builds.

There are also several I-WP related to Training that are contributing to the total number of Delayed tasks and activities associated with WP408 – System Test Scripts are also delayed for System Testing Cycles 4-9.

The Florida PALM IV&V Team observed an increase in the number of Florida PALM Project Decisions approved in November. The Figure below shows the decisions approved in the last three months.

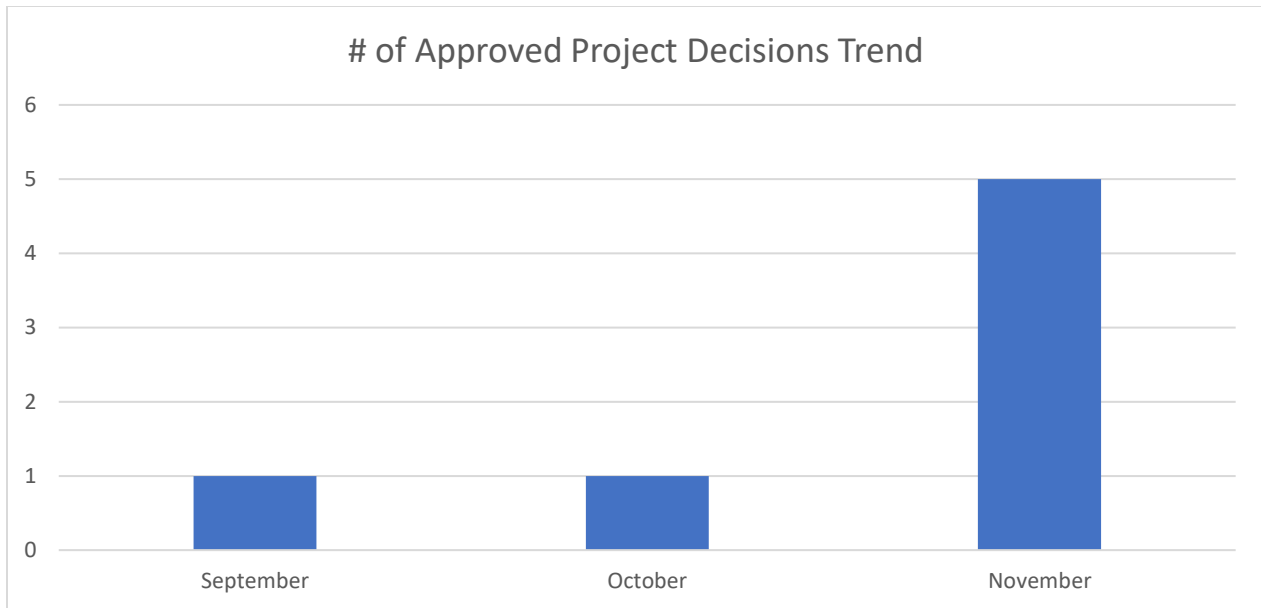


Figure 3: # of Approved Project Decisions Trend

The 5 Decisions approved by Florida PALM Project leadership in November included:

1. Adding tasks to further define work effort for I-WPs.
2. Removing or deferring test scripts to System Testing Segment II.
3. Updating the review dates for vulnerability scans as reported in the Monthly Performance Report Deliverables.
4. Updating the report title and description in Application Designs (AD).
5. Moving six Build items from D649 to D654 along with a revision to the report name for APR012 Payment Performance Report.

These decisions aim to address task clarifications, schedule adjustments, and report updates in alignment with Florida PALM Project objectives.

The Florida PALM IV&V Team reviewed the Decisions to ensure adherence to the Decision Management Process outlined in the Florida PALM Project Management Plan. The Florida PALM IV&V Team is currently analyzing applicable phases and components to identify potential risks, issues, or unintended impacts on the Florida PALM Project's scope and budget. Initial comments and questions have been submitted to the Florida PALM Project Team, and responses have been received. A full assessment of the Project Decisions will be provided at a later date.

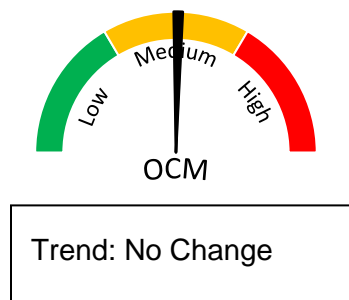
The Florida PALM IV&V Team also reviewed the eight open Florida PALM Project Risks. Six of those Risks are increasing in trend with a risk score of 6 and have status comments dating back to August in some instances. The Florida PALM Project is experiencing delays in Development, which is impacting Mock Conversion, Interface Testing, and the availability of material for Training. Given the dynamic nature of the Florida PALM Project and the potential for new Risks to emerge, the Florida PALM IV&V Team recommends more frequent and detailed risk

assessments to keep risk management relevant. This includes opening specific Risks when applicable, with tailored mitigation strategies to minimize impacts. The Florida PALM IV&V Team also suggests increasing the frequency of CRAIDL meetings to biweekly for more timely risk discovery, focused discussion, and adjustments to mitigation strategies as needed.

The Florida PALM Project Management Risk Rating remains a Medium Risk.

Florida PALM Organizational Change Management

Focus Area Indicator



Florida PALM Organizational Change Management Updates

In addition to routine OCM efforts, the Florida PALM Project Team hosted a Design Summary and Test Preparation Workshop and conducted several meetings to discuss the TTT program, UAT, and the overall Florida PALM Training approach with Agencies. The Florida PALM IV&V Team also met with the Florida PALM Project Team on 11/18/24 to discuss Training-related questions.

As the Training strategy evolves for the Florida PALM Project, UAT is positioned as a key component for hands-on, Agency-specific training. Real data and Test Scripts will serve as step-by-step guides to assist Agencies in documenting their strategy for testing their specific business processes. Agency SMEs involved in UAT will build upon their experience to help develop Training materials for end-users. UAT, combined with a Learning Management System (LMS) based learning curriculum, face-to-face workshops, and job aids, will address different learning preferences and styles. Agencies that have participated in discussions about this approach with the Readiness Team have expressed agreement with this strategy.

The Florida PALM Project Team began meeting with Agencies in October and continued in November to gauge sentiment regarding the TTT program based on responses to RW Task 549 – Submit Training Survey and assess the potential impacts of canceling it. While a decision to terminate the TTT program has not been explicitly announced, it was strongly implied to prepare Agencies for the anticipated change to the Florida PALM Project Training strategy. UAT is now positioned as the primary vehicle for Training delivery, targeting both SMEs and end-users.

During Agency Readiness Touchpoints and other meetings, the Florida PALM IV&V Team observed instances where RCs facilitated the exchange of contact information for key project management personnel between Agencies. They encouraged engaging these individuals during the Design Summary and Test Preparation Workshops, as well as outside of these sessions. By promoting inter-agency collaboration (especially for solving problems, brainstorming, and addressing interface issues) RCs are fostering teamwork and building strong, dependable

relationships. This approach not only supports the Florida PALM Project but will also benefit Agencies in the post-implementation phase. The Florida PALM IV&V Team encourages further positive and collaborative engagement across Agencies.

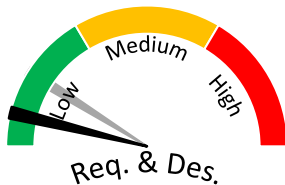
Other recommendations from the Florida PALM IV&V Team include:

- Formalizing a decision about the TTT program and communicating it effectively to all Agencies both in writing and verbally during Agency Readiness Touchpoints. Use additional communication channels, such as Summits, workshops, Town Halls, PALMCasts, and the Knowledge Center to reinforce and complement this messaging.
- Continuing to remind Agencies of the importance of leveraging UAT as both a Training and Testing opportunity, which will be supplemented with other Training delivery methods. Clearly communicate the expectations for Agency SMEs involved in UAT, particularly if they are responsible for developing end-user Training materials.

The Risk Rating for this Focus Area remains a Medium Risk.

Florida PALM Requirements and Design

Focus Area Indicator



Trend: Improving

Florida PALM Requirements and Design Updates

Design Deliverables have been approved, and the Florida PALM Project Team is currently focused on the pre-build and Build activities based on the approved Designs. Project Change Request (PCR) 121 may have additional Design-related Deliverables, and the Florida PALM IV&V Team will review and participate in the Design discussions when they are scheduled.

Current discussions about Data Warehouse (DW) and Business Intelligence (BI) are centered on reporting requirements and the execution of WP438 – Data migration and modeling strategy. The Florida PALM IV&V Team will continue to participate in these discussions as they are scheduled.

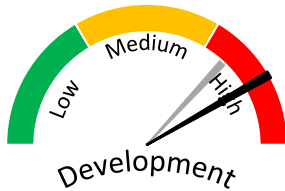
The Florida PALM IV&V Team completed a review of D650 – Completion of Solution Design (Requirements) DW/BI. This review included performing a traceability analysis between the FDs and the Requirements Traceability Matrix (RTM) and a review of the individual FDs for quality and completeness. The Florida PALM IV&V Team provided identified deficiencies, comments, and questions to the Florida PALM Project Team. The Florida PALM Project Team responded with how these items would be corrected before Deliverable approval or provided explanations for why specific items would not be updated. Previous reviews of the Segment I-V FDs have shown them to be complete and of high quality, and traceability inconsistencies identified by the Florida PALM

IV&V Team have always been identified and corrected by the Florida PALM Project Team before Deliverable approval.

The Risk Rating for this Focus Area remains a Low Risk but has decreased from medium to low green.

Florida PALM Development

Focus Area Indicator



Trend: Declining

Florida PALM Development Updates

Build Segments III and IV

While all Build Segment III AD documents have been drafted, 42 of the 123 have not been approved as of 11/30/24. All Build Segment III AD documents were targeted for approval by 9/27/24. The Florida PALM IV&V Team has observed several root causes that have contributed to the delays in Build Segment III, including:

- Development staff misunderstanding content in the FDs, leading to rework.
- Development staff needing to make multiple rounds of updates to AD documents based on feedback and clarifications from the Florida PALM Project Team.
- Onboarding newly added Development staff that do not have background knowledge of the Florida PALM Project.
- Initial underestimation of the scope and complexity of Build Segment III.

Alongside the review and approval of Segment III AD documents, pre-meetings and Development efforts for Segment IV have also commenced. Build Segment IV was originally scheduled to be completed by 1/6/25 but based on the schedule in the draft DED for D653 – Completion of Build Segment IV, the last AD documents will not be approved until 3/18/25. This represents a nine-week delay from the original target date and aligns with the current Florida PALM IV&V Team projected completion date. The Table below shows the key original scheduled dates and the expected dates.

Table 3: Changes to Key Dates

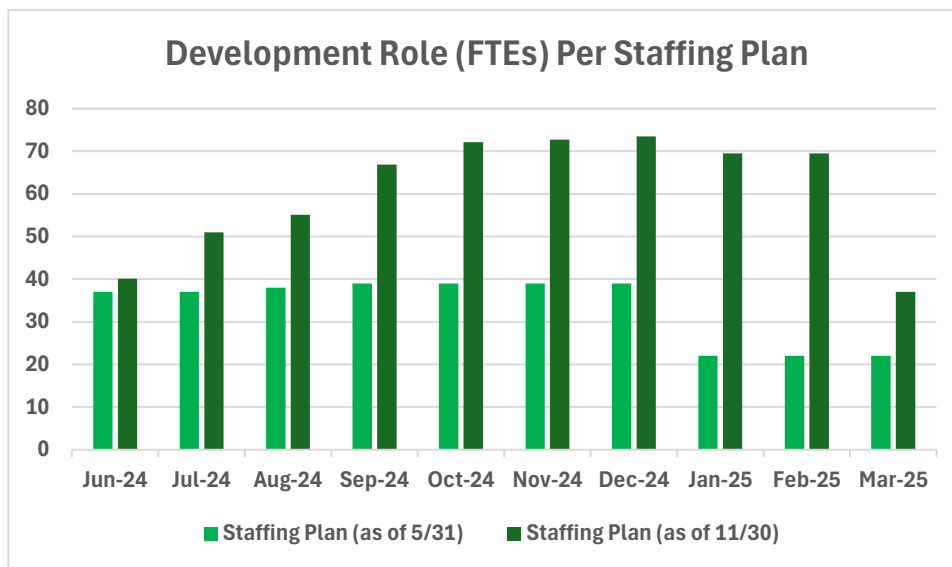
Key Dates	Original Expected Date	Current Expected Date
Completion of Build Segment IV	1/6/25	3/18/25*
Completion of System Testing	2/28/25	4/30/25**
Stage Gate 3 – Ready to Begin UAT	3/28/25	3/28/25

* Based on Draft DED for D654 – Completion of Build Segment IV

** Based on Approved D643 – Updated System Testing Plan

Since June 2024, the Florida PALM SSI vendor has consistently added Development staff to try to minimize the Build Segment III and IV delays. The changes to Development staffing levels are shown in the table below.

Figure 4: Changes in Development Staffing



The Florida PALM IV&V Team observed an increase in the pace of drafting AD documents for Build Segment III beginning in October 2024. Concurrent with the review and approval of the remaining Segment III AD documents, Build Segment IV has also started. Pre-build meetings are ongoing to review the Build Segment IV FDs with the Development team before starting the Build. These meetings include SSI Vendor Development and Functional staff and Florida PALM Project Team SMEs and Leads. As Build Segment IV started in mid-November, there is not enough information to determine if the additional Development staff have increased the pace of Build compared to Build Segment III.

The continued delays in Build Segments III and IV are expected to delay the completion of System Testing and may impact Stage Gate 3 – Ready to Begin UAT. Additionally, these delays are already impacting Mock Conversion and Interface Testing Cycle 2.

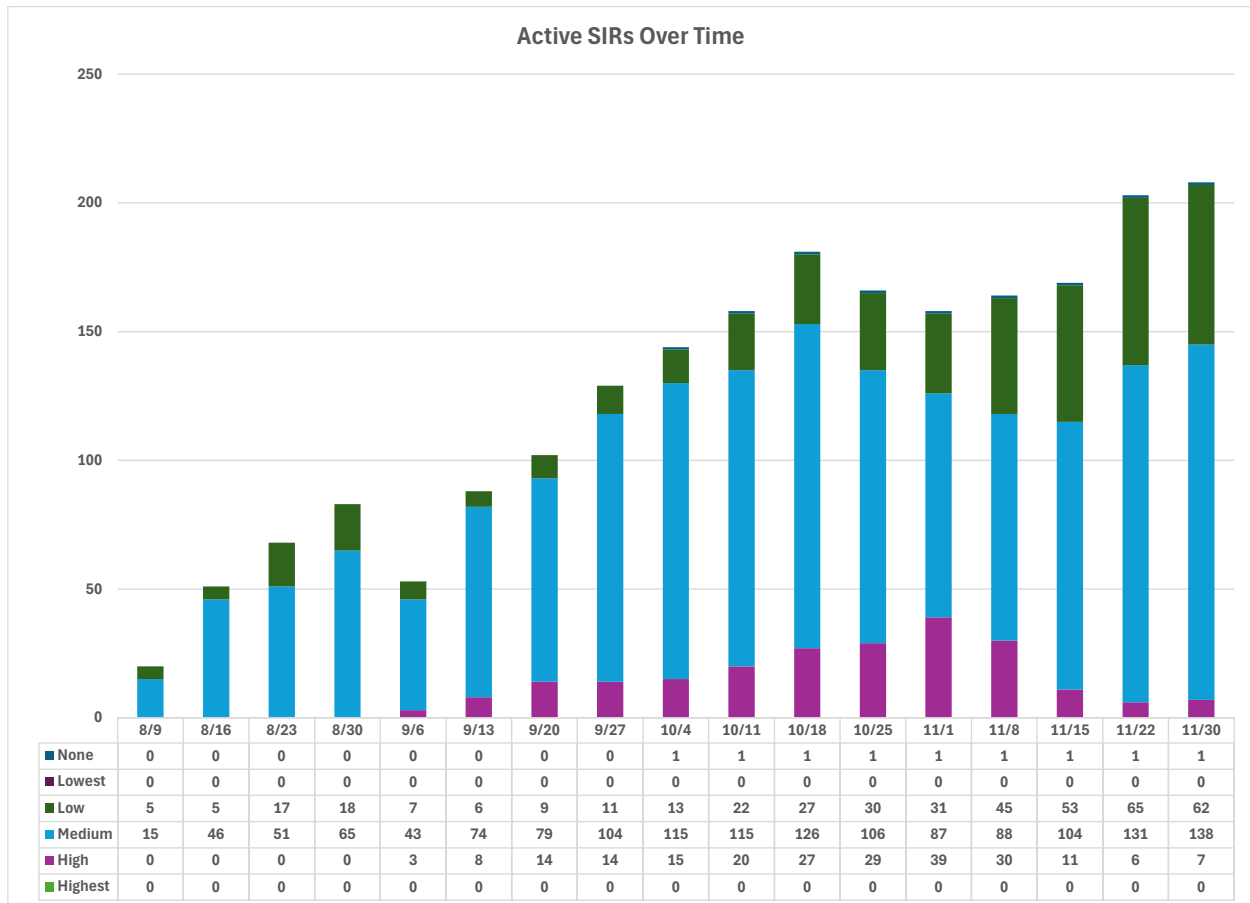
DW/BI Build Segments I and II

The DW/BI Build Segment I is on track for completion in the first week of December. As of 11/30/24, 21 of the 24 DW/BI Build Segment I AD documents have been approved, and the last three are waiting for final review by Florida PALM Project leadership. DW/BI Build Segment II has also begun, and three of the four draft AD documents planned for November have been completed. Twelve reports are part of DW/BI Build Segment II, and they are expected to be approved by 1/17/25. Another 20 DW/BI reports will be part of the future DW/BI Build Segment III.

SIR Resolution

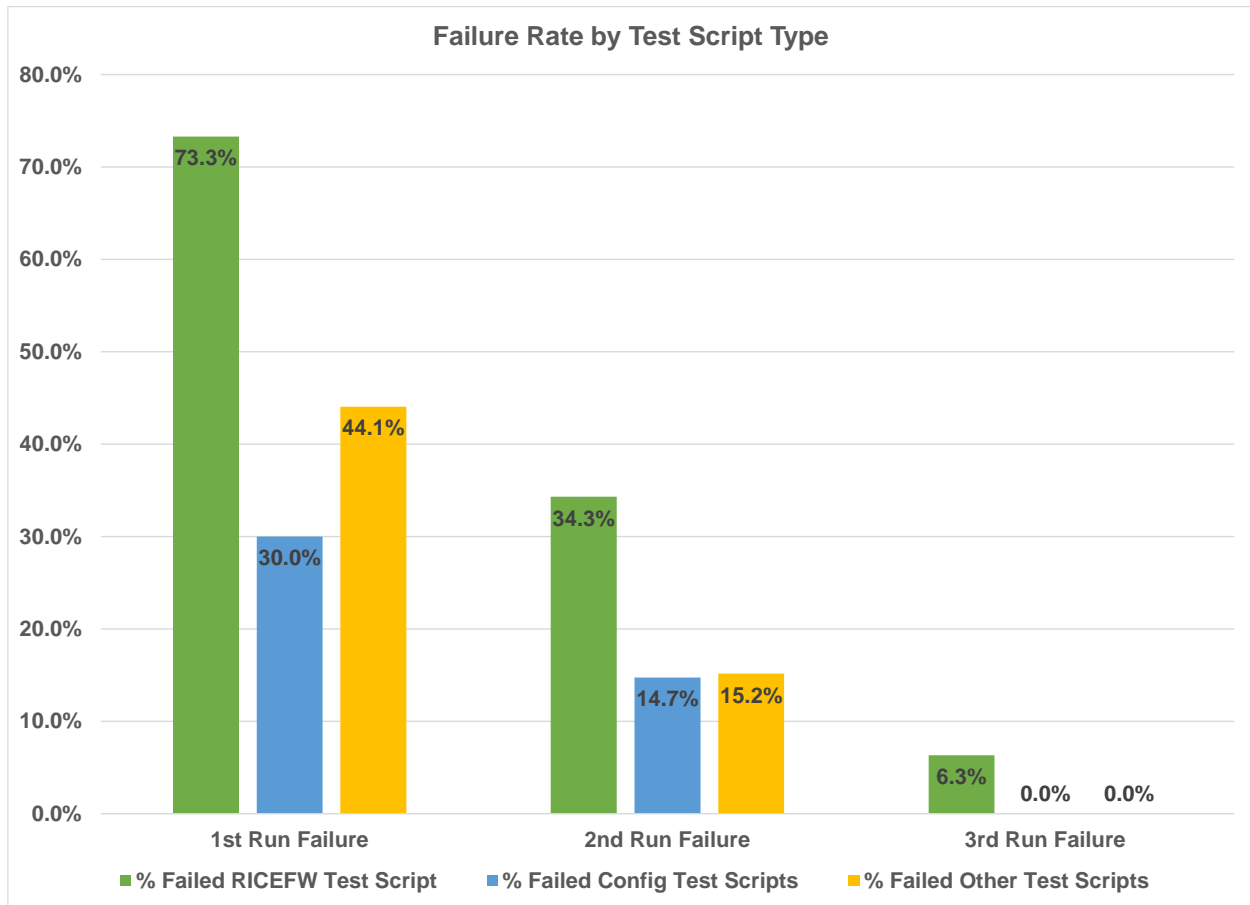
In addition to the ongoing Development efforts, the Florida PALM SSI Vendor needs to allocate Development staff to resolve SIRs identified during System Testing. The growing number of SIRs being opened and the increasing number of unresolved SIRs present a potential bottleneck that may require additional Development staff to provide timely resolutions. The Figure below shows the count of unresolved SIRs over time, categorized by their assigned priority in Jira (None to Highest).

Figure 5: Unresolved SIRs over Time



Although the High-priority SIRs are being addressed in a timely manner, there is an increasing number of open Medium-priority SIRs that need to be resolved and retested. Additionally, a growing number of Test Scripts related to RICEFW Items are failing initial execution and subsequent retests. The Figure below shows the failure rate for various types of Test Scripts across multiple test runs.

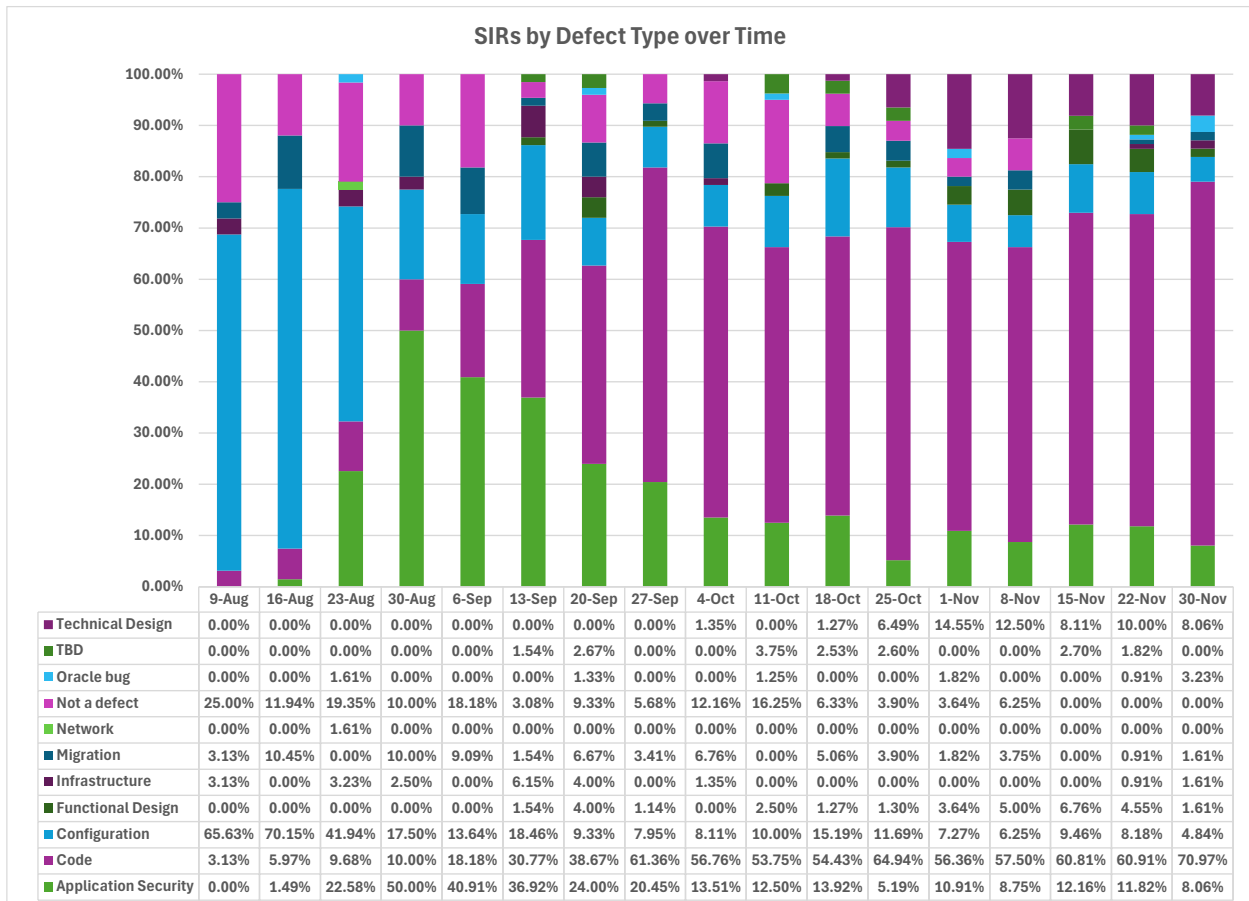
Figure 6: Failure Rates Per Test Type



If the current failure rate continues, the number of new SIRs and the amount of retesting required will continue to increase as System Testing moves further into current and future Cycles.

Finally, most of the new SIRs are being identified as “code” defect types, which indicates that Development staff will be required to resolve them. The Figure below shows the percentage of new SIRs by defect type over time based on the week the SIR was created. This data represents a snapshot as of 11/30/24.

Figure 7: SIRs by Defect Type Over Time

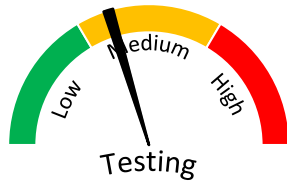


The percentage of SIRs that are identified as “code” defect types indicates a potential concern related to the quality of code being provided to System Testing as well as a need for additional Development support to mitigate delays in passing Test Scripts. Based on the high failure rate for RICEFW-related Test Scripts, the increasing number of Medium-priority SIRs, and the high percentage of “code” defects, the Florida PALM IV&V Team identified Finding 15. The Florida PALM IV&V Team’s recommendations to mitigate the impact of these items on Stage Gate 3 – Ready to Begin UAT are also included in Finding 15.

Due to continued delays in Build Segment III and the concurrent need to support more SIRs being identified, the Risk Rating for this Focus Area remains High Risk but is increasing from Low to Medium Red.

Florida PALM Testing

Focus Area Indicator



Trend: No Change

Florida PALM Testing Updates

As of 11/30/24, the Florida PALM SSI Vendor has completed test execution for the planned Test Scripts for System Testing Cycles 0-3, as reflected in the TEXT. The Florida PALM IV&V Team also observed that System Test Execution for Segment I did not extend beyond 11/14/24, likely due to the Completion of System Testing Segment I task being marked as 100% on the Florida PALM Project Schedule. Although execution is complete for the planned Test Scripts in System Testing Segment I, many additional Test Scripts, as shown in the TSWUT and the WP408 folder on the DFS SharePoint, have not yet been included in the TEXT and will need to be executed in future Cycles.

Per the approved Florida PALM Project Decision DE350, 122 Test Scripts have been canceled or deferred from System Testing Segment I to future Testing Segments. The reasons for these changes include missing User Roles in the approved version of WP 405 – Security Roles Matrix, duplicate Test Scripts, and Build items that are either under review or pending Development, which will be available for testing in later segments. DE350 also included the addition of 156 new Test Scripts to System Testing Segment I. These Test Scripts will be included in D652 – Completion of System Test Segment I.

The Florida PALM IV&V Team observed that Test Scripts related to RICEFW Items in Cycles 2 and 3 continued to have an initial fail rate (73.3%) that is higher than other types of Test Scripts. This suggests that the RICEFW Items developed so far may be of low quality, that Development staff may not fully understand the functionality outlined in the FDs, or that Unit Testing may not have been sufficiently comprehensive before releasing code into the System Testing environments. Almost 71% of the SIRs opened for Cycles 2 and 3 are attributed to “code” issues, as seen in the Root Cause field in Jira. The number of Test Scripts related to RICEFW Items will increase in future System Testing Cycles as the remaining Build Segments are completed. If the high failure rate of Test Scripts for RICEFW Items persists alongside the growing volume of RICEFW-related Test Scripts, the need for multiple re-runs and resolution of the resulting SIRs poses a risk to the current System Testing timeline, potentially increasing the overlap with UAT or delaying its start (Finding 15).

The Table below gives a snapshot of the execution status for all four System Testing Cycles as of 11/30/2024.

Table 4: Planned and Actual Number of Test Cases

Cycle	Total No of Test Cases	No. of Test Cases Canceled/Deferred	Actual No of Test Cases Executed	Pass	Fail	Pass % (based on executed)	Fail % (based on executed)
Cycle 0	347	27	320	319	1	99%	1%
Cycle 1	192	29	163	162	1	99%	1%
Cycle 2	395	58	337	308	29	91%	9%
Cycle 3	295	17	277	253	24	91%	9%
Grand Total	1230	131	1097	1042	55	95%	5%

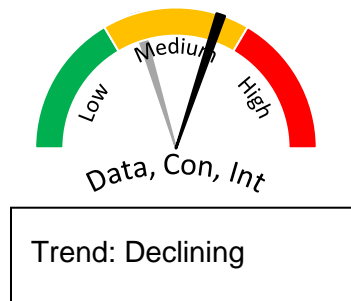
The Florida PALM SSI Vendor is expected to continue drafting Test Scripts for other Cycles concurrently with System Testing execution, as seen in the TSWUT.

The Florida PALM State Testing Team has begun testing the Florida PALM solution alongside the SSI Vendor. The Florida PALM IV&V Team will continue to observe these testing efforts, follow up with the Florida PALM Project Team about any questions or concerns, and provide additional updates in a future report.

The Risk Rating for this Focus Area continues to remain a Medium Risk.

Florida PALM Data, Conversion, and Interfaces

Focus Area Indicator



Florida PALM Data, Conversion, and Interface Updates

The Florida PALM IV&V Team participated in the final Design Summary and Testing Preparation Workshop where the Florida PALM Project Team provided an overview of the final Designs of the Florida PALM solution and updates on the current testing timeline. The Florida PALM IV&V Team also attended multiple daily and weekly configuration, Interface, and data-related meetings in November.

Conversions

The completion of Mock Conversion 0B – Financials and Payroll, originally scheduled for early October, has been delayed past November due to the delayed development of Payroll Conversion interfaces in Build. In November, the Florida PALM Project Team made progress on Conversion

activities on eight of the 14 interfaces for Mock Conversion 0B, completing four. Of the remaining four Conversion interfaces, three are 50% complete, and one is 25% complete.

The delay in completing Mock Conversion 0B has affected the timeline for Mock Conversion 1B pushing its completion from late November to early December. Since the files for Mock Conversion 0B and Mock Conversion 1B are similar, the Florida PALM Project Team may be able to recover lost time executing the remaining Conversion interfaces for Mock Conversion 1B once Mock Conversion 0B is complete. For Mock Conversion 1B, the Florida PALM Project Team has completed Conversion activities for two of the 10 Conversion interfaces, and one is 50% complete.

To mitigate downstream delays to Mock Conversion 2, the Florida PALM Project Team plans to initiate Mock 2A for Finance on time, in parallel with Mock Conversions 0B and 1B. This approach will allow them to begin working on available Finance Conversion interfaces on time and execute Payroll files as soon as Mock Conversion 1B is completed but will give the Agencies less time to review the converted files and correct bad data.

The Figure below shows the Priority and status of SIRs for Mock Conversion 0B as of 11/30/24.

Table 5: Status of SIRs for Mock Conversion 0B

Priority	Jira Status		
	Resolve	Re-test	Closed
High	2	0	3
Medium	10	1	39
Low	0	1	1
Total	12	2	43

Note: A Jira status of Resolve indicates the SIR has been assigned to the appropriate Development staff and a fix is being worked on. A Jira status of Re-test indicates a resolution for the SIR has been loaded into the Testing environments and is ready for re-test. A Jira status of Closed indicates that the SIR resolution has passed a re-test and has been closed.

Two High-priority SIRs for Mock Conversion 0B are in Resolve status. One, logged in November, is associated with a missing configuration issue resulting in a process failure. The other was opened in October due to performance issues.

The Florida PALM IV&V Team observed that Mock Conversion 1A had two High-priority SIRs in Resolve status as of 11/30/24. One SIR is associated with performance issues, and the other is associated with system errors occurring in transactions with 0 values in certain fields, requiring an update to a program to allow 0 values. No updates have been provided in Jira regarding the resolution progress.

Table 6: Status of SIRs for Mock Conversion 1A

Priority	Jira Status		
	Resolve	Re-test	Closed
High	2	0	4
Medium	7	3	9
Low	0	0	0
Total	9	3	13

There are no defects opened for Mock Conversion 1B.

Interfaces

During an Interface Touchpoint meeting, the Florida PALM IV&V Team observed that the Florida PALM Project Team has been reviewing the Interface inventories submitted by the Agencies and providing feedback. Some Agency submissions contain inventories with incomplete or incorrect information (i.e., not all the necessary interfaces have been selected, inbound and outbound interfaces have not been balanced, etc.). The Florida PALM Project Team has scheduled meetings with six select Agencies to assist them in analyzing and completing this Task.

While all 138 Test Scripts for Interface Connectivity Testing have been executed, the Florida PALM IV&V Team observed that web service connectivity for the State Travel Management System (STMS) and Managed File Transfer (MFT) Connectivity Testing for a newly identified partner is still pending and is expected to be completed by the end of December.

Data Warehouse/Business Intelligence

The Florida PALM IV&V Team attended weekly DW/BI status meetings, DW/BI Working Sessions, and DW/BI Build-and-Review meetings. DW/BI Build Segment I remains on track for completion in December. DW/BI Build Segment II has begun, with completion planned for January 2025. Twenty DW/BI reports are planned for inclusion in future DW/BI Build Segment III.

Delays in Mock Conversions 0B and 1B and the remaining unresolved High and Medium-priority defects from Mock Conversions 0B and 1A (particularly those tied to "Performance Challenges") pose a risk to successive Mock Conversions and may lead to downstream impacts. Furthermore, the Florida PALM IV&V Team has opened Finding 16 regarding this risk to document the potential impact and track progress of the Mock Conversions. Due to this, the Risk Rating for this Focus Area remains a Medium Risk but is increasing from Low to High Yellow.

Florida PALM Implementation Readiness

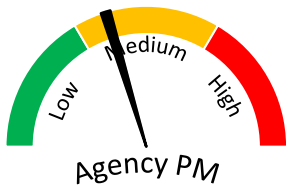
Florida PALM Implementation Readiness Updates

The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

Florida PALM Agency Focus Area Updates

Agency Project Management

Focus Area Indicator

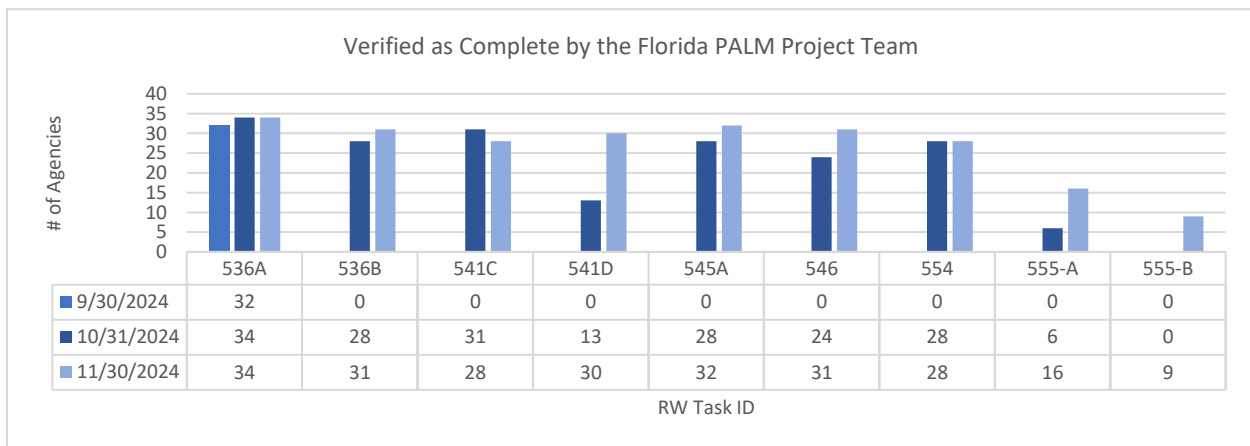


Trend: NA

Agency Project Management Updates

The Florida PALM IV&V Team reviewed Agencies' completion of RW Tasks in November to assess risks to their preparedness for UAT activities. This evaluation also provides insights into potential risks and issues affecting the overall readiness timeline and Florida PALM Project Schedule. Below is the trend analysis of RW Tasks with a Direct or Indirect Impact on the Florida PALM Project. These Tasks were due before 11/30/24 and have been Verified as Complete by the Florida PALM Project Team. Tasks Verified as Complete are those where an Agency has reported a submission of 100%, and the submitted information or data has been verified by the Florida PALM Project Team as complete against the Task Rubric. RW Tasks that were reviewed by the Florida PALM Project Team and determined to be insufficient or incomplete, requiring resubmission by the Agency, are not included in the Figure.

Figure 8: Tasks Verified as Complete by the Florida PALM Project Team



RW Tasks 541C and D – Complete Configuration Workbooks for Segment IV, are critical for ensuring proper configurations for SpeedKey and Payroll functionality. Agencies failing to complete these Tasks risk having sample data loaded into the Testing environments, potentially impacting their Mock Conversion activities, UAT readiness, and Go-live success.

RW Task 546 – Update Florida PALM Interface Inventory for Segment IV is critical for the remaining Agencies to complete, as the selected Interfaces will inform planning for Interface Testing in early 2025 and UAT in mid-2025. Some of the reasons Agencies have given for not completing this Task include they are waiting for the outcome of the DW/BI Designs (which have been completed as of 11/11/24) and awaiting confirmation of what Interfaces will be used.

RW Task 555A and B – Complete Data Cleansing Based on Mock Conversion 1 are important to verify that accurate and clean data is converted into Florida PALM. For Task 555A, all but two Agencies have reported 100% submitted and are waiting to be verified. For Task 555B, 12 Agencies have not reported 100% submission, and 14 are waiting to be verified.

The Florida PALM IV&V Team has observed a trend over the past three months that highlights some Agencies are struggling to meet the RW Schedule for Tasks with a Direct Impact to the Florida PALM Project. Agencies have cited staffing challenges and competing operational priorities as contributing factors. With an increasing volume of Tasks due in December and January, it will likely become even more challenging for these Agencies to address overdue Tasks, potentially impacting their readiness for key milestones, including Interface Testing, UAT, and Go-Live.

The Florida PALM IV&V Team also observed that there will be an additional five days added to the verification process for a secondary review. The goal is to validate true and accurate Task tracking. The Florida PALM IV&V Team views this as a positive initiative. It will help verify that the Task tracker is accurate, give additional visibility into the information being provided by the Agencies, and assist in resolving potential risks and issues earlier for both the Florida PALM Project Team and the Agencies. This additional time for Task verification may also impact the overall Readiness timeline.

The current Task list includes nine assignments due from November to December 2024, except for Task 561 – Remediate Agency Business Systems based on Segment IV, due in March 2025. Additionally, Task 567A through I – Share, Review, and Update Configuration Workbooks includes eight closely related assignments. The volume of Tasks, coupled with the upcoming holiday season and anticipated staff absences, increases the likelihood of delays in Task completion. Agencies struggling to achieve 'green' status on their Agency Readiness Dashboards should consider implementing processes to break Tasks into smaller, actionable steps that can be assigned to multiple staff members and account for PTO coverage to minimize readiness impacts.

The Florida PALM IV&V Team recommends that Agencies confirm with their RCs they fully understand the necessary updates within the Smartsheet Tasks to ensure accurate and timely updates. Relevant project management practices that the Agencies could consider implementing within their teams include:

- Applying Scrum methodology to break Tasks into smaller increments and execute them in time-boxed sprints, which means a strict time limit, and conduct daily stand-ups to track progress and address bottlenecks in real-time.
- Applying Kanban methodology by using a visual Task board to track Tasks, identify workflow inefficiencies, and focus on work-in-progress limits to maintain momentum.

Agencies are reporting resource constraints, with CCNs responsible for multiple roles, and critical RW Tasks needing to be started or completed during the holiday season, which could make it more difficult to complete the RW Schedule.

Risk Management

The Florida PALM IV&V Team observed an increase in Open Issues and Open Risks reported by the Agencies since October. Issues and Risks are self-reported and self-assessed by the Agencies. The Table below shows the running total as new Risks and Issues are reported by the Agencies each month.

Table 7: Agency Risks and Issues

Issues	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Risks	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24
Open Issues	80	88	91	86	94	Open Risks	253	283	288	313	331
Critical or High	64	68	70	64	68	Risks Score 6+	136	142	142	154	162

The Open Issues increased by 9%, and the Open Risks increased by 6%. The Critical and High Priority Issues and the Risks score 6 or higher increased by 6%.

In November, the Florida PALM IV&V Team observed 17 new Issues were opened and nine Issues were closed. Additionally, 34 new Risks were identified, and 14 Risks were closed. Of the 17 newly opened Issues, nine were categorized as Critical or High priority. Similarly, 18 out of 34 new Risks were assigned a risk score of 6 or higher. Sixty-five percent of the new Issues and 32% of the new Risks opened in November lack sufficient details regarding their description, impact, and ownership. For instance, “UAT – Incorrect Financial Calculations” and “UAT Poor Load Performance Testing” fail to provide comprehensive information on the challenges, potential impacts, or their connection to UAT activities. Twenty-four percent of the new Risks opened and scored at a 6 or higher in November include a resolution plan to mitigate or avoid the risk. Critical or High-priority Issues and Risks with scores of 6 or higher documented in the areas of Technology, Data, and Business Processes include:

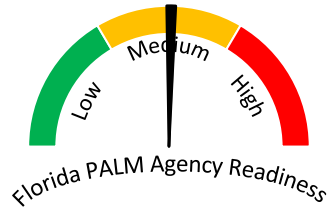
- Challenges related to interface selection and testing.
- Agency processing through external and third-party applications.
- Data alignment following Mock conversions using Florida PALM data files.

The Florida PALM IV&V Team recommends that Agencies strengthen their risk management practices by incorporating the risk-writing techniques shared during the November Risk Writing Workshop. These practices should include clearly outlining challenges, potential impacts, and ownership of each risk or issue and evaluating and refining the criteria used to assess and assign priority levels and risk scores. Agencies should also proactively identify and communicate constraints or dependencies that may affect their readiness for UAT to their RCs.

The Risk Rating for this Focus Area is a Medium Risk.

Florida PALM Agency Readiness

Focus Area Indicator



Trend: NA

Florida PALM Agency Readiness Updates

In interviews with the Florida PALM IV&V Team, Agencies expressed concerns about the overlap between UAT, Training activities, and YEC activities. Based on the growing trend that many of the Agency SMEs will be responsible for conducting UAT, developing Training materials, and handling YEC operational tasks, the Florida PALM IV&V Team has opened Finding 17. This Finding highlights how the overlap may lead to resource constraints, change fatigue, burnout, and affect the effectiveness of Training delivery.

The Risk Rating for this Focus Area is a Medium Risk.

Agency Requirements and Design

Agency Requirements and Design

The Florida PALM IV&V Agency Team has no update for this Focus Area. The IV&V Team will continue to observe and provide updates in future reports as identified.

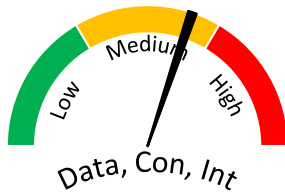
Agency Testing

Agency Testing Updates

The Florida PALM IV&V Team will begin reporting progress once Agency Testing efforts begin.

Agency Data, Conversion, and Interfaces

Focus Area Indicator



Trend: NA

Agency Data, Conversion, and Interfaces Updates

The Florida PALM IV&V Team observed in Readiness Touchpoints and interviews with Agencies, that there is a common concern related to Interface Inventory Tasks. Some Agencies that completed the Interface Tasks were informed during Readiness Touchpoint meetings that they completed them incorrectly. In response, they expressed concern that they still do not fully understand the Interfaces. Other Agencies stated they could not complete the Interface Inventory Tasks until the Florida PALM Project Team provided further explanation and review. Additionally, several Agencies have asked whether Interface Inventories can be updated or corrected in the future, but they have not received definitive answers from the Florida PALM Project Team. Since incomplete or delayed Interface Tasks could affect the Interface Testing timeline and Agencies' readiness for UAT, the Florida PALM IV&V Team will cross-reference these Agency-reported challenges with information available in the Florida PALM Knowledge Center and Agency Smartsheets.

The Florida PALM IV&V Team acknowledges the Florida PALM Project Team's proactive approach in planning Interface discussions with select Agencies to provide clarifications on their Interface Inventories. Other Agencies that do not receive this clarification may either continue to delay or inaccurately complete their interface inventory tasks, which may impact Agency readiness and subsequent Testing activities.

The Risk Rating for this Focus Area is a Medium Risk.

Agency Implementation Readiness

Agency Implementation Readiness Updates

The Florida PALM IV&V Team will begin reporting progress once Agency Implementation efforts begin.

Key Metrics or Analysis

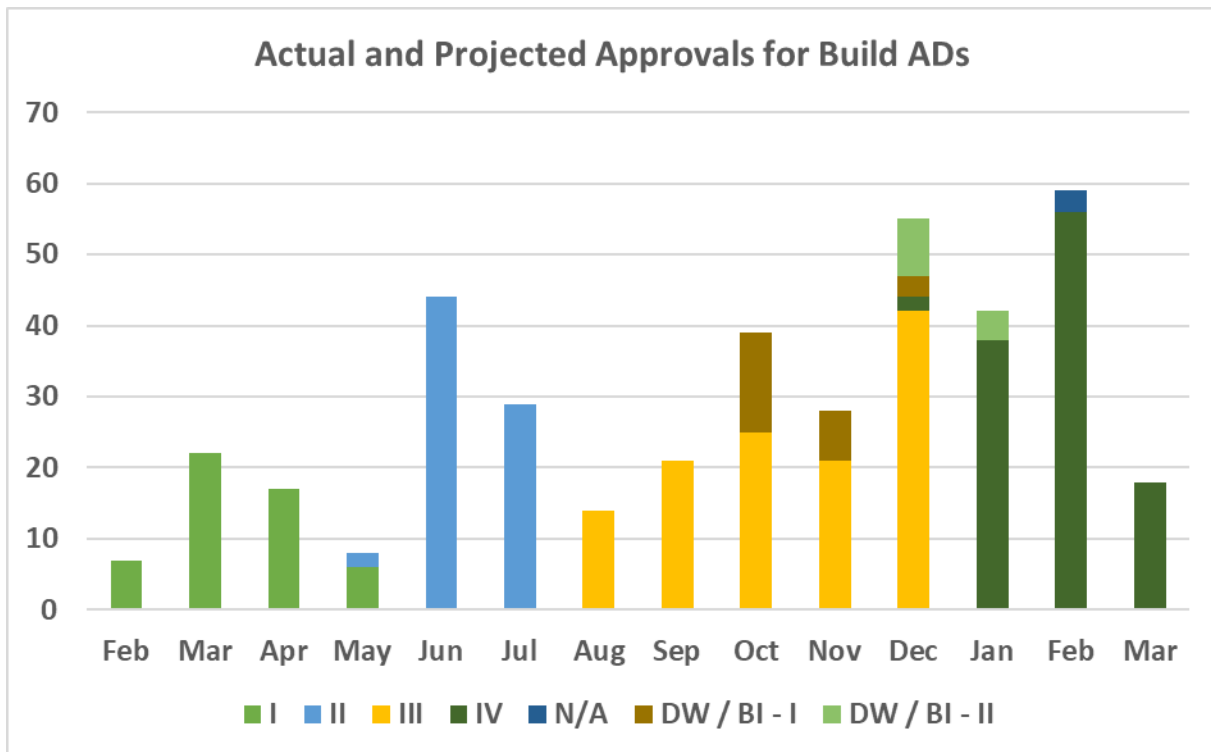
This section provides metrics the Florida PALM IV&V Team uses to assess processes or activities.

Development Metrics

Actual and Projected Approval Dates for AD Documents

The Figure below shows the actual and projected dates for approval of the AD documents by Build Segment. The counts for February through November are based on the actual final approval dates for the AD documents, while December through March are based on projected dates for final approval. There is expected to be a large volume of AD documents that need to be reviewed and approved from December 2024 until March 2025.

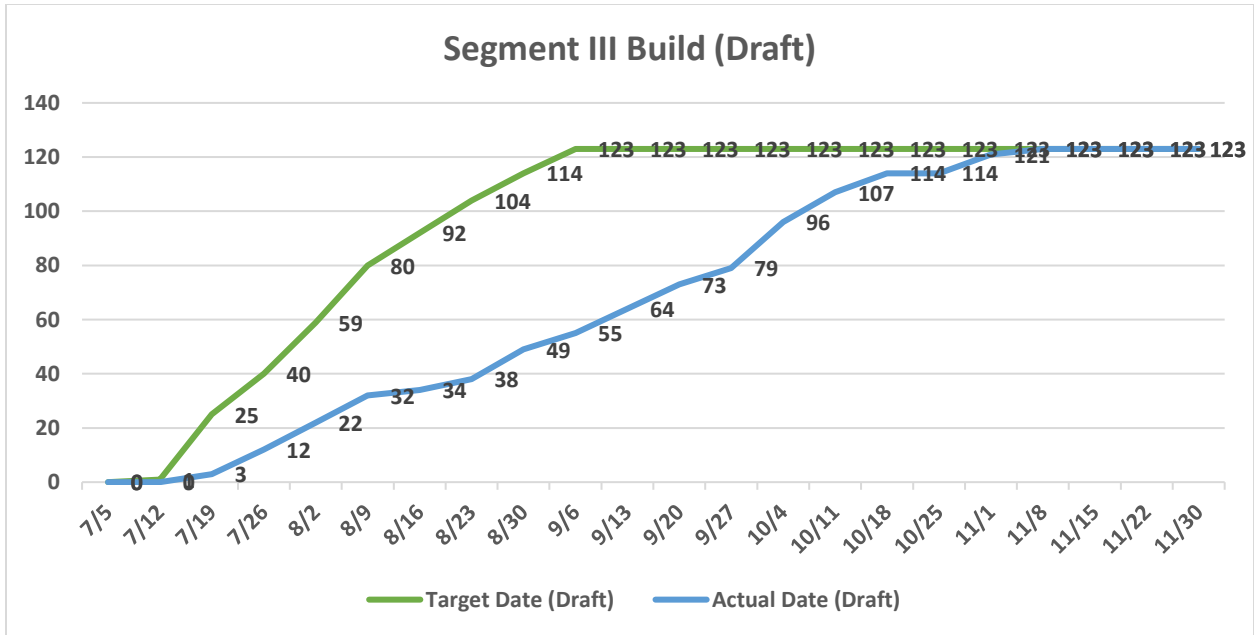
Figure 9: Actual and Projected AD Approval Dates



Build Segment III Draft

The Figure below shows the targeted number of drafted AD documents versus the completed count for Build Segment III. As of 11/30/24, the Florida PALM SSI Vendor has drafted all 123 AD documents.

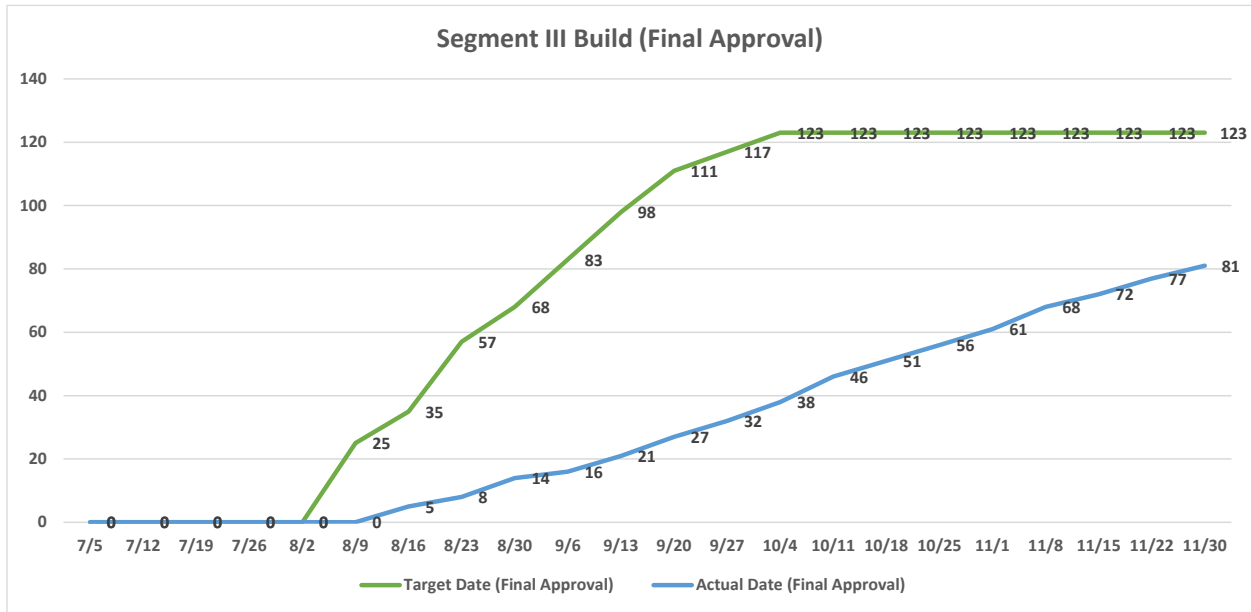
Figure 10: Segment III AD Documents – Draft



Build Segment III Final Approval

The Figure below shows the targeted number of AD documents for final approval versus the actual approved count for Build Segment III. As of 11/30/24, the Florida PALM Project Team has approved 81 of the 123 AD documents. All 123 Segment III AD documents were targeted to be approved by 9/30/24.

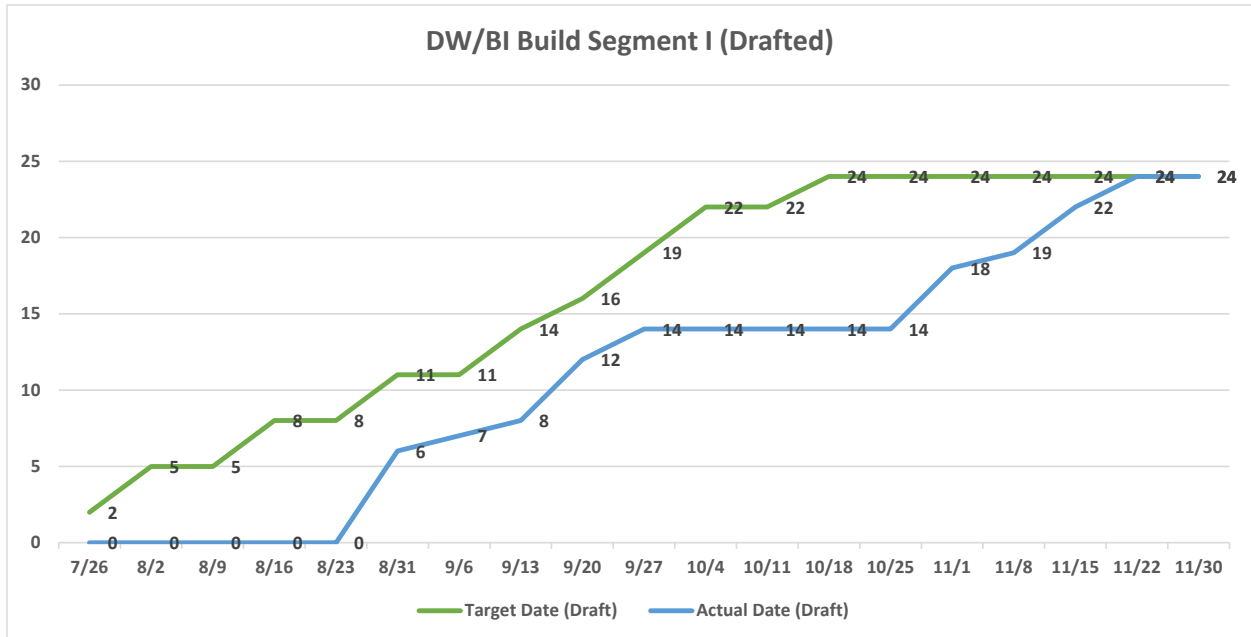
Figure 11: Segment III AD Documents – Final Approval



DW/BI Build Segment I Draft

The Figure below shows the targeted number of drafted AD documents versus the completed count for DW/BI Build Segment I. As of 11/30/24, the Florida PALM SSI Vendor has drafted all 24 planned AD documents.

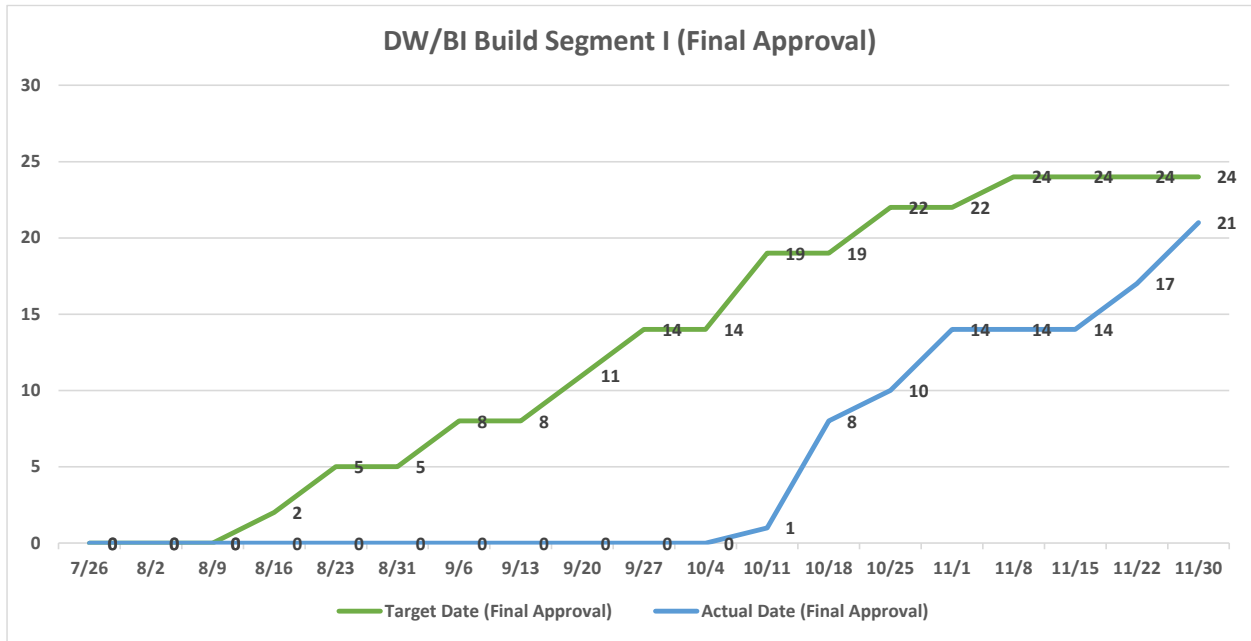
Figure 12: DW/BI Build Segment I – Drafted



Build DW/BI Segment I Final Approval

The Figure below shows the targeted number of AD documents for final approval versus the actual approved count for DW/BI Build Segment II. As of 11/30/24, the Florida PALM Project Team has approved 21 of the 24 AD documents. The three remaining ADs are currently in final review for approval.

Figure 13: DW/BI Build Segment I – Final Approval

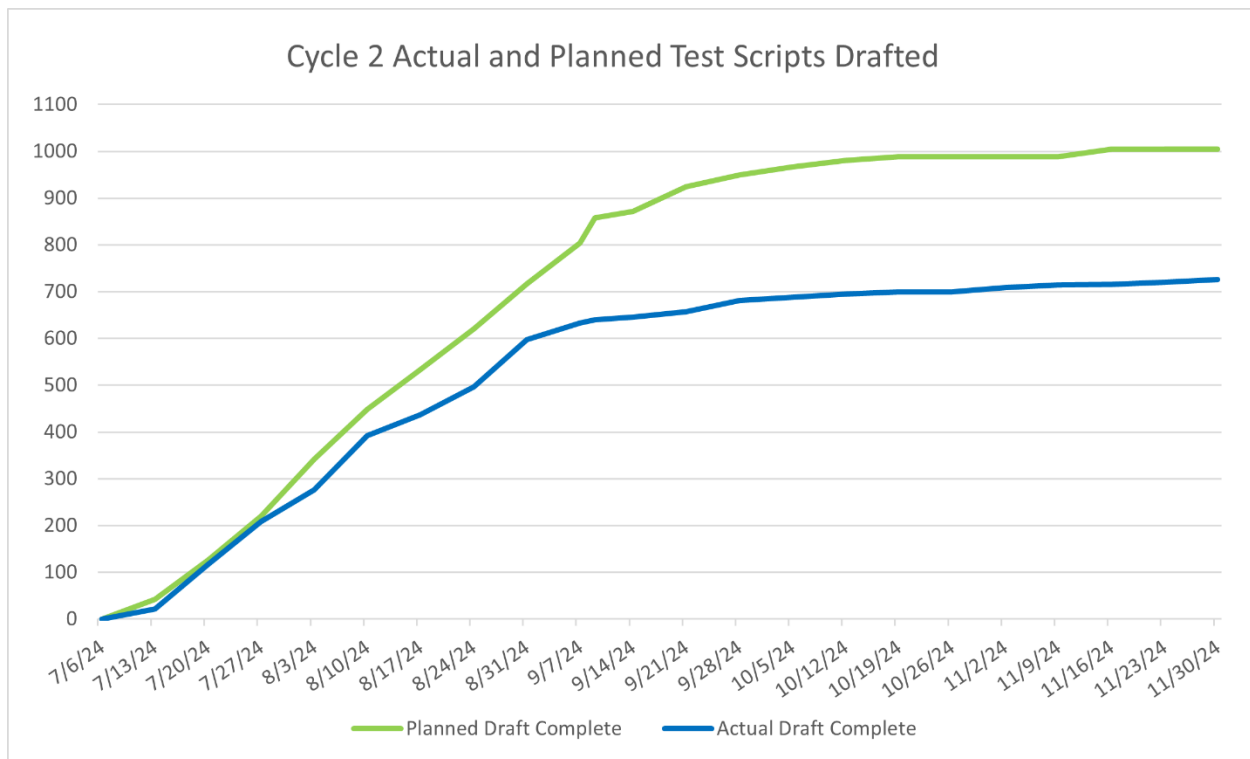


Testing Metrics

System Testing Cycle 2 Test Scripts Drafted Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts drafted for Cycle 2 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had drafted 726 Test Scripts, which is 279 fewer than planned.

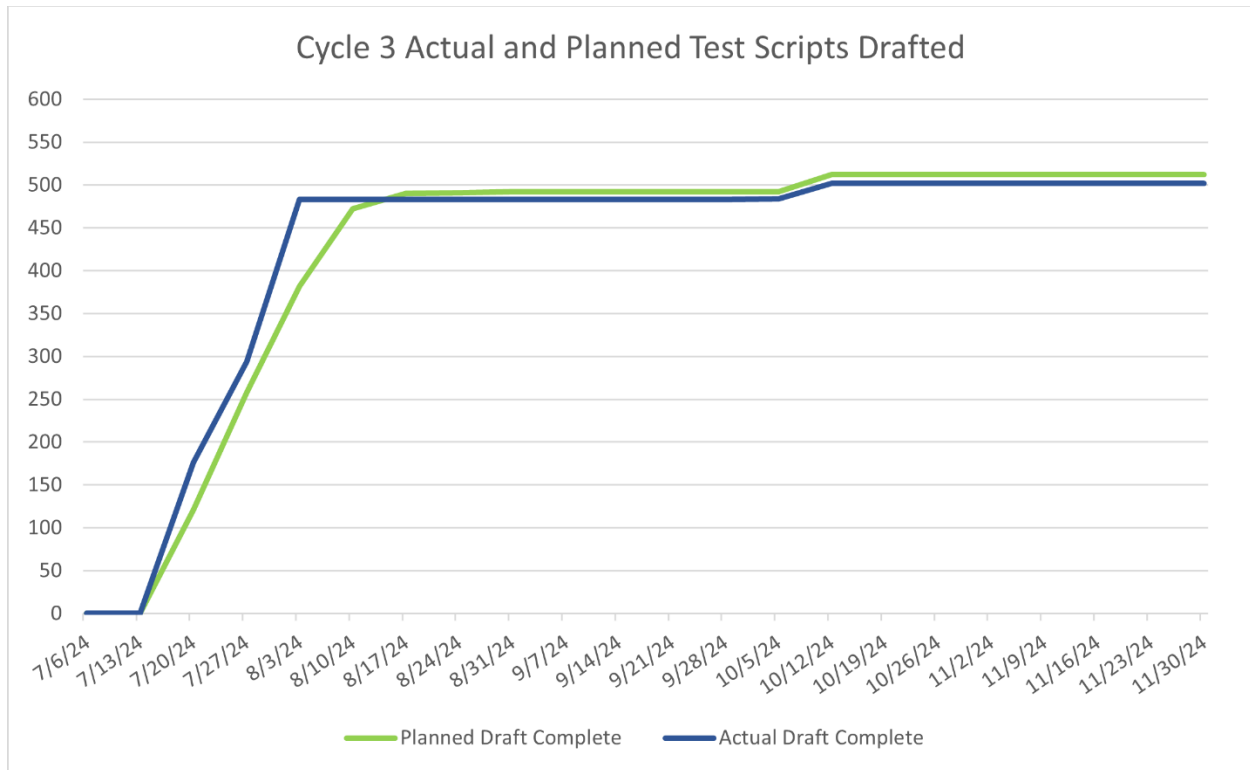
Figure 14: Cycle 2 Actual and Planned Test Scripts Drafted



System Testing Cycle 3 Test Scripts Drafted Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts drafted for Cycle 3 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had drafted 502 Test Scripts, which is 10 fewer than planned.

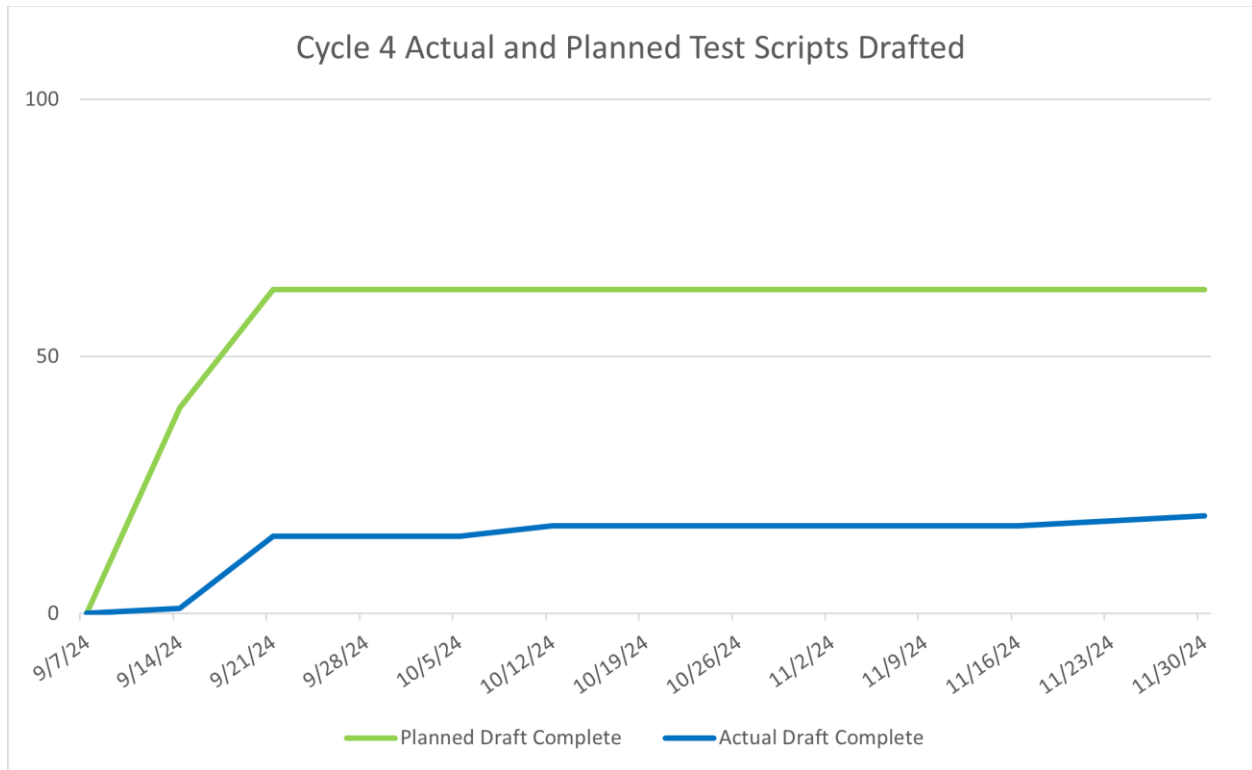
Figure 15: Cycle 3 Actual and Planned Test Scripts Drafted



System Testing Cycle 4 Test Scripts Drafted Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts drafted for Cycle 4 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had drafted 19 Test Scripts, which is 44 fewer than planned.

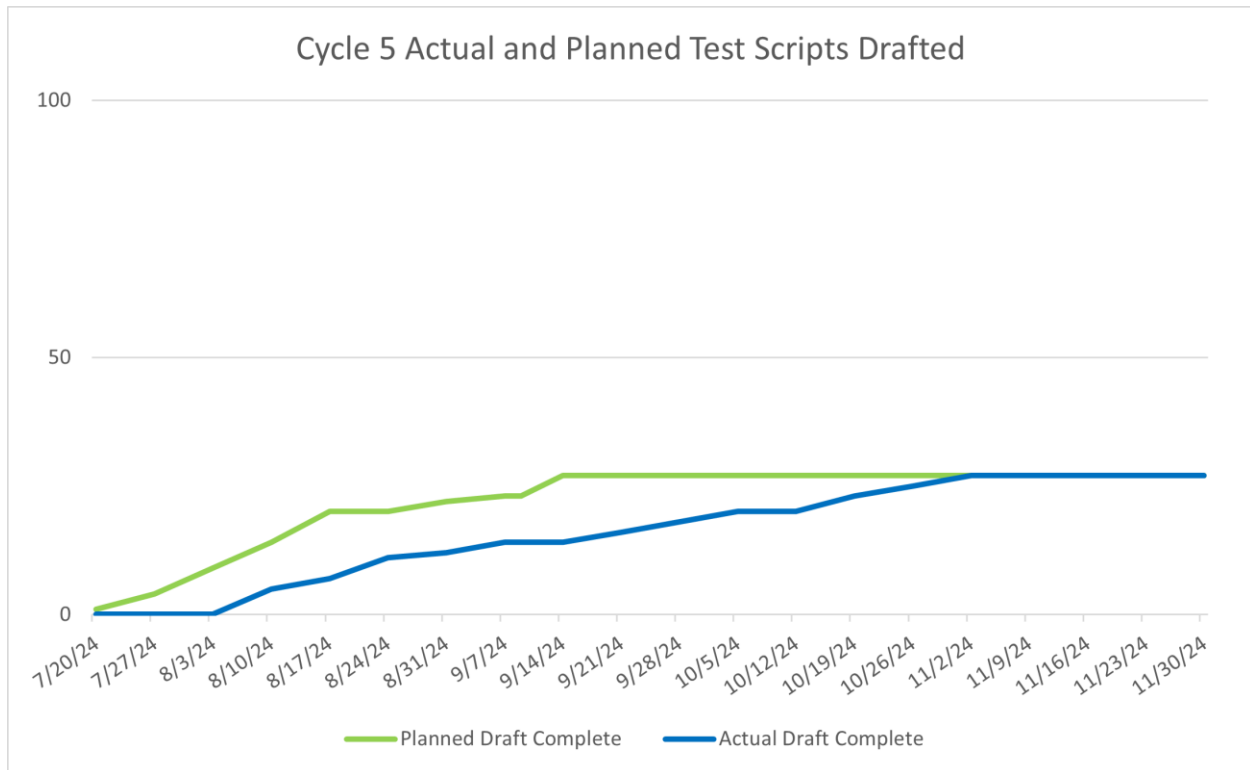
Figure 16: Cycle 4 Actual and Planned Test Scripts Drafted



System Testing Cycle 5 Test Scripts Drafted Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts drafted for Cycle 5 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had drafted 27 Test Scripts, which matches what was planned.

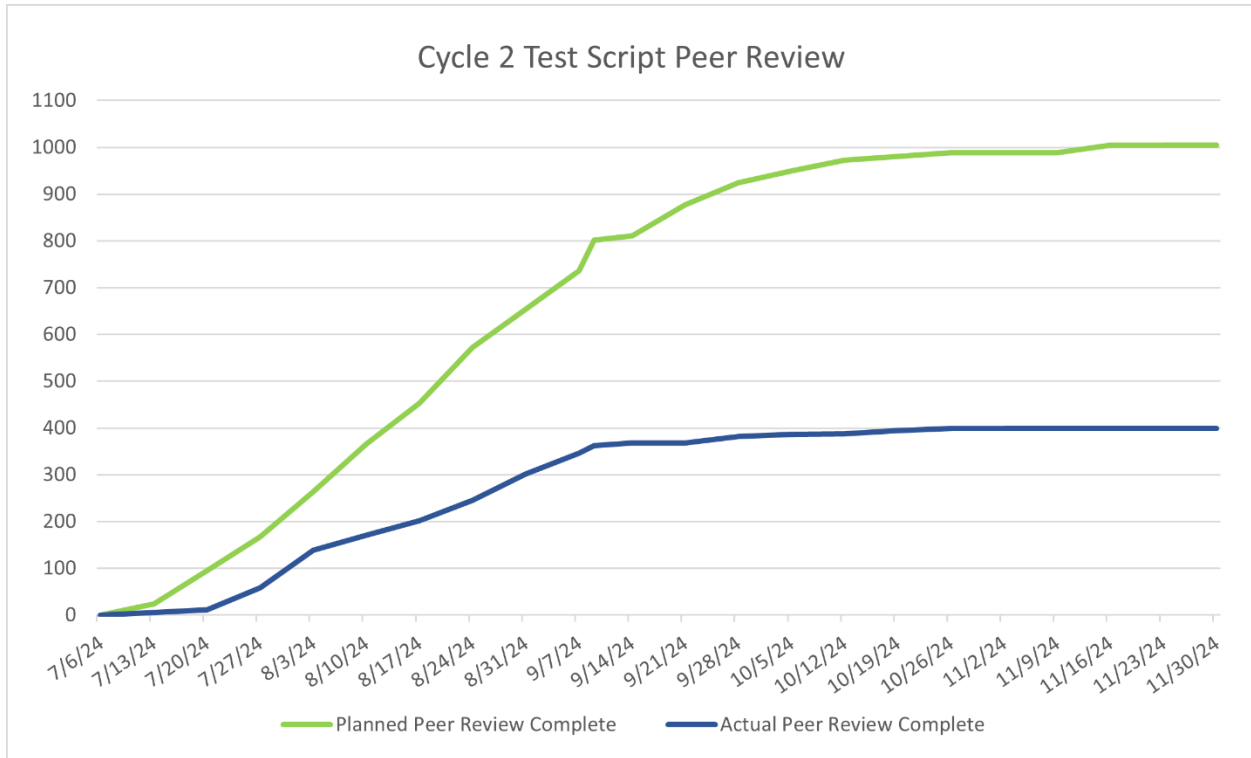
Figure 17: Cycle 5 Actual and Planned Test Scripts Drafted



System Testing Cycle 2 Test Scripts Peer Review Planned versus Actual

The Figure below shows the number of peer-reviewed planned versus actual Test Scripts for Cycle 2 of System Testing. As of 11/30/24, the Florida PALM Project Team has peer-reviewed 399 Test Scripts, which is 606 fewer than planned.

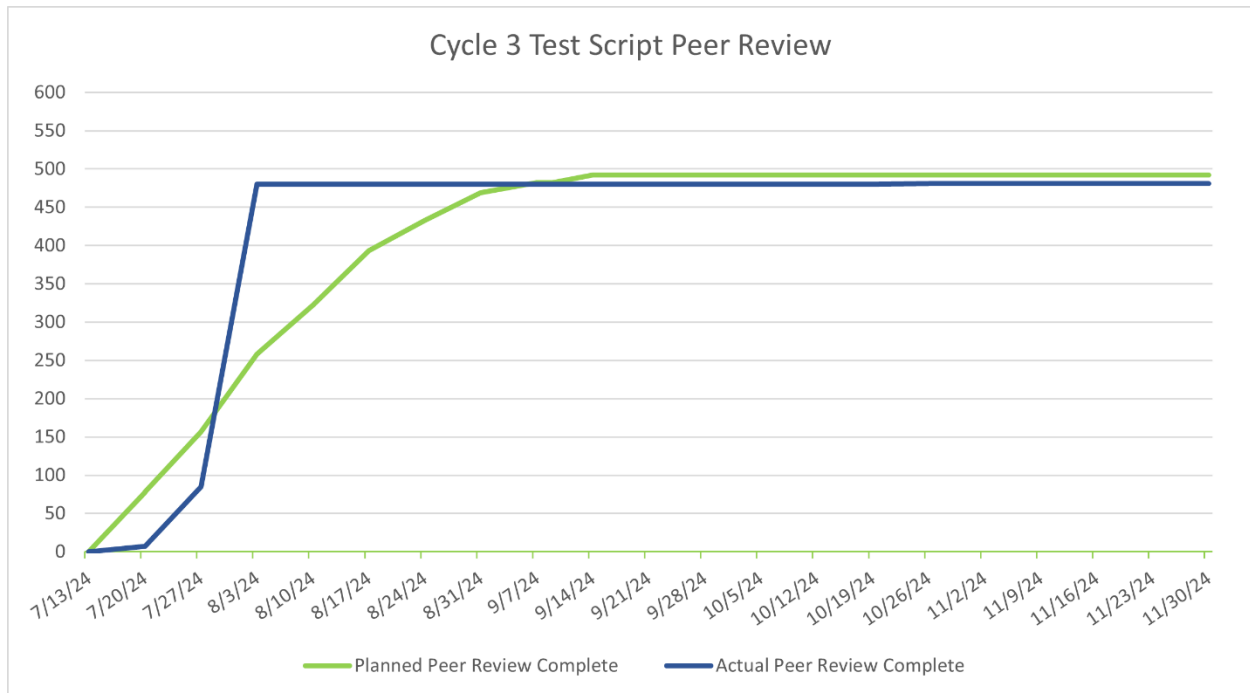
Figure 18: Cycle 2 Test Script Peer Review



System Testing Cycle 3 Test Scripts Peer Review Planned versus Actual

The Figure below shows the number of peer-reviewed planned versus actual Test Scripts for Cycle 3 of System Testing. As of 11/30/24, the Florida PALM Project Team has peer-reviewed 481 Test Scripts, which is nine fewer than planned.

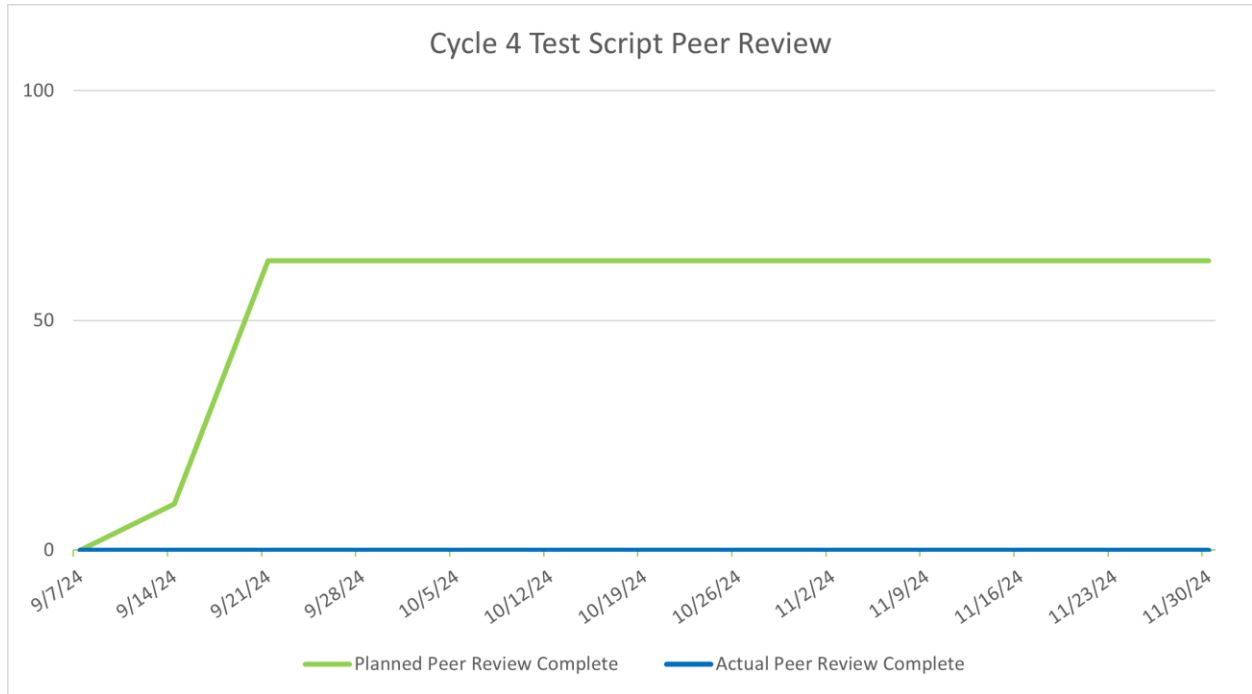
Figure 19: Cycle 3 Test Script Peer Review



System Testing Cycle 4 Test Scripts Peer Review Planned versus Actual

The Figure below shows the number of peer-reviewed planned versus actual Test Scripts for Cycle 4 of System Testing. As of 11/30/24, the Florida PALM Project Team has not peer-reviewed any Test Scripts, which is 63 fewer than planned.

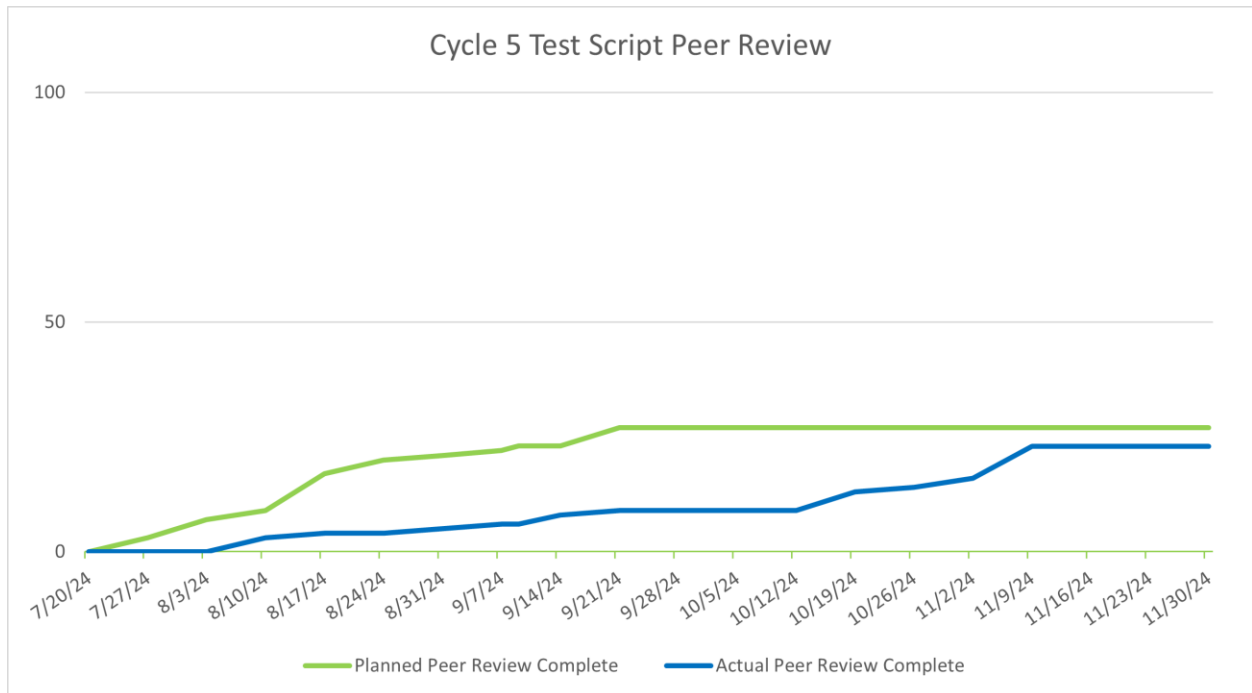
Figure 20: Cycle 4 Test Script Peer Review



System Testing Cycle 5 Test Scripts Peer Review Planned versus Actual

The Figure below shows the number of peer-reviewed planned versus actual Test Scripts for Cycle 5 of System Testing. As of 11/30/24, the Florida PALM Project Team has peer-reviewed 23 Test Scripts, which is four fewer than planned.

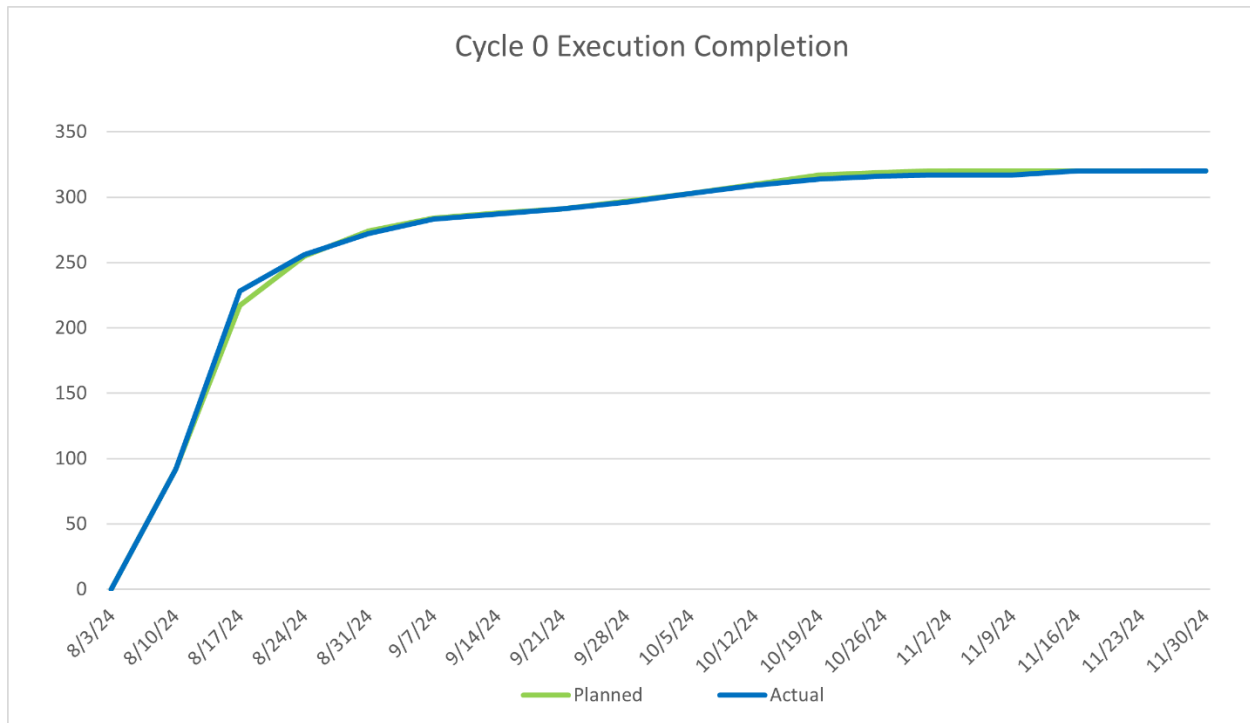
Figure 21: Cycle 5 Test Script Peer Review



System Testing Cycle 0 Test Scripts Executed Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts executed for Cycle 0 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had executed 320 Test Scripts, which matches what was planned.

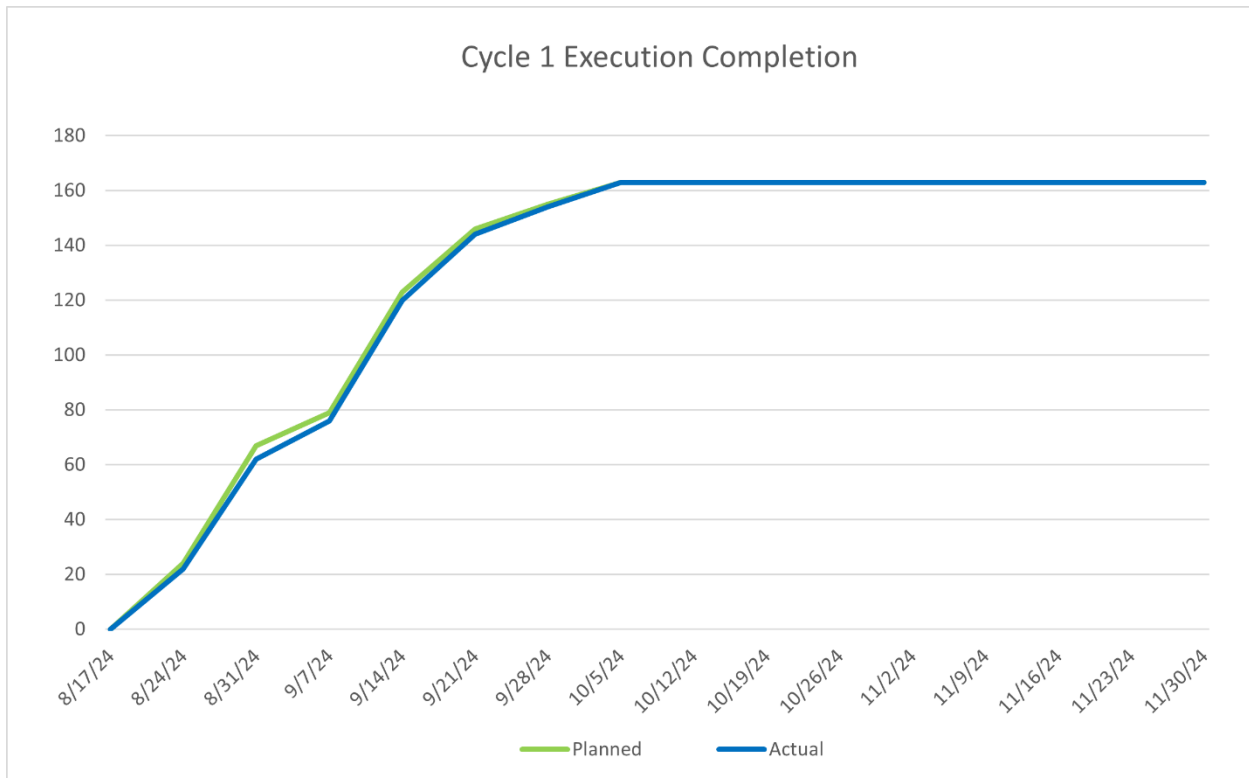
Figure 22: Cycle 0 Test Scripts Executed Planned versus Actual



System Testing Cycle 1 Test Scripts Executed Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts executed for Cycle 1 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had executed 163 Test Scripts, which matches what was planned.

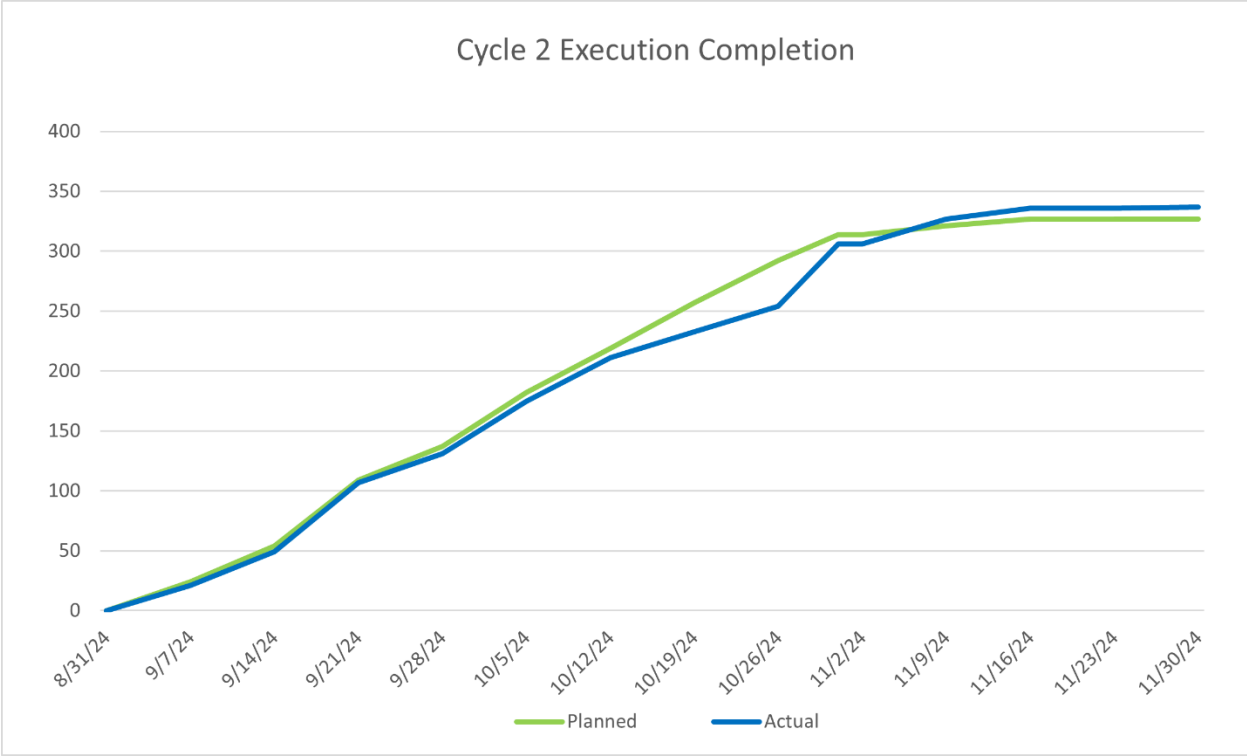
Figure 23: Cycle 1 Test Scripts Executed Planned versus Actual



System Testing Cycle 2 Test Scripts Executed Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts executed for Cycle 1 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had executed 337 Test Scripts, which is 10 more than planned.

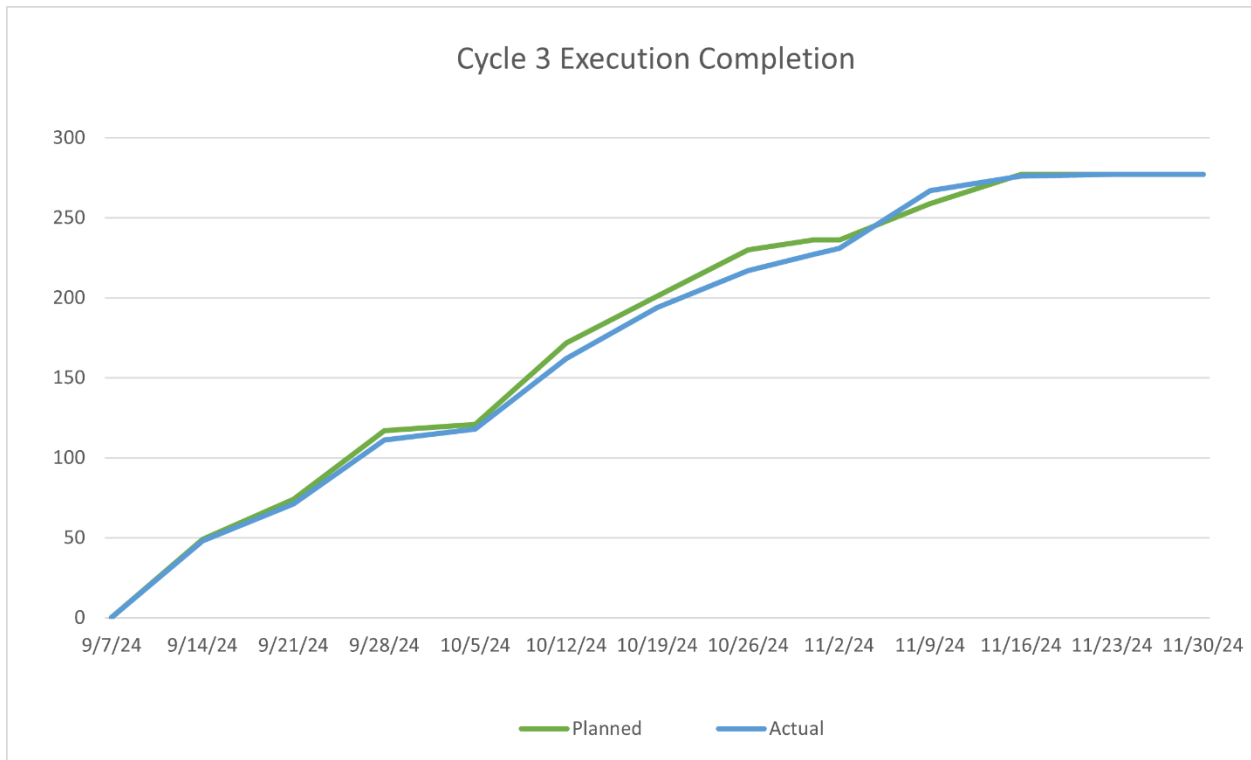
Figure 24: Cycle 2 Test Scripts Executed Planned versus Actual



System Testing Cycle 3 Test Scripts Executed Planned versus Actual

The Figure below shows the number of planned versus actual Test Scripts executed for Cycle 1 of System Testing. As of 11/30/24, the Florida PALM SSI Vendor had executed 227 Test Scripts, which matches what was planned.

Figure 25: Cycle 3 Test Scripts Executed Planned versus Actual



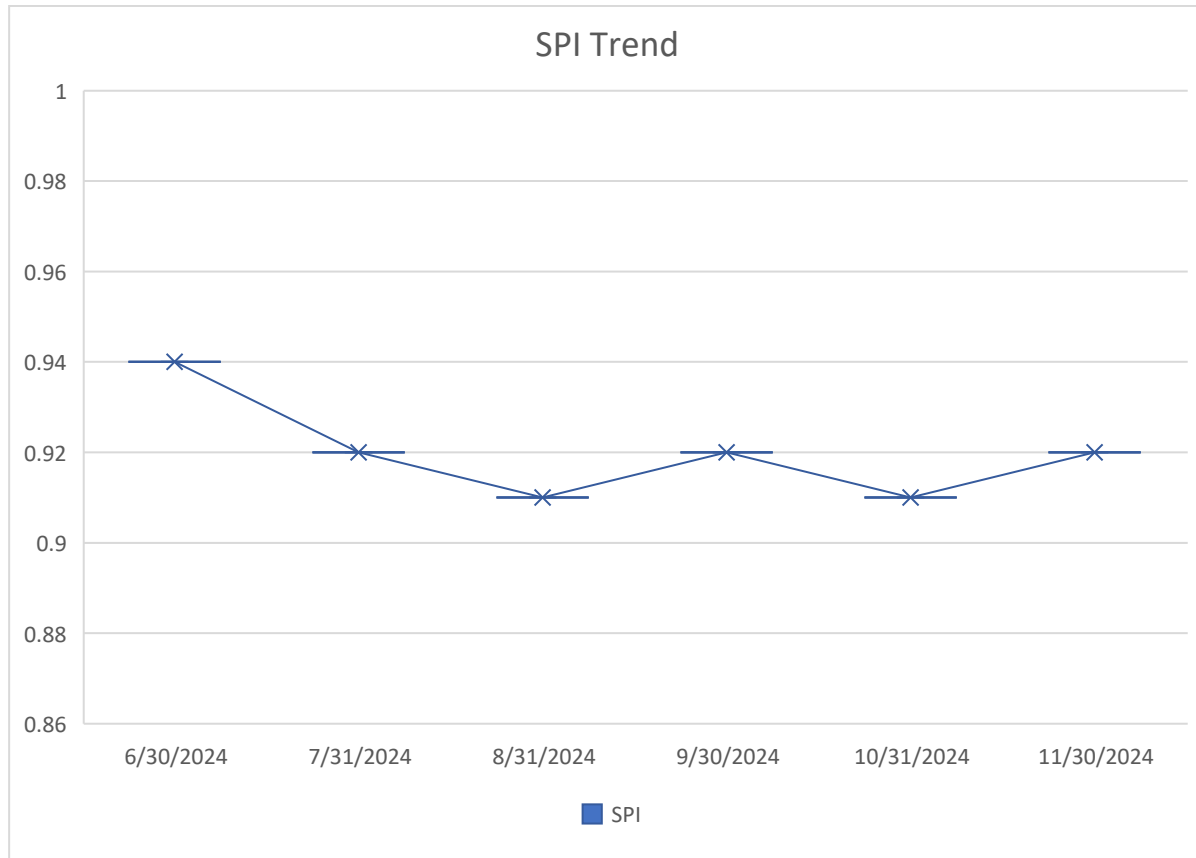
Project Management Metrics

SPI Trend for the Florida PALM Project Schedule

The Figure below shows the SPI trend for the Florida PALM Project Schedule over the last 6 months. The SPI measures schedule efficiency as the ratio of earned and planned value. The data represents the relative number of tasks that are behind or ahead of schedule. The SPI of .92 means the Florida PALM Project is progressing at 92% of the planned pace, indicating it is slightly behind schedule. An SPI of .92 does not fall within the range of a defined risk to the Florida PALM Project, as shown in Appendix A – Risk Priority Matrix. The interpretation of SPI is as follows:

- If SPI = 1, the Project is on schedule.
- If SPI < 1, the Project is behind schedule.
- If SPI > 1, the Project is ahead of schedule.

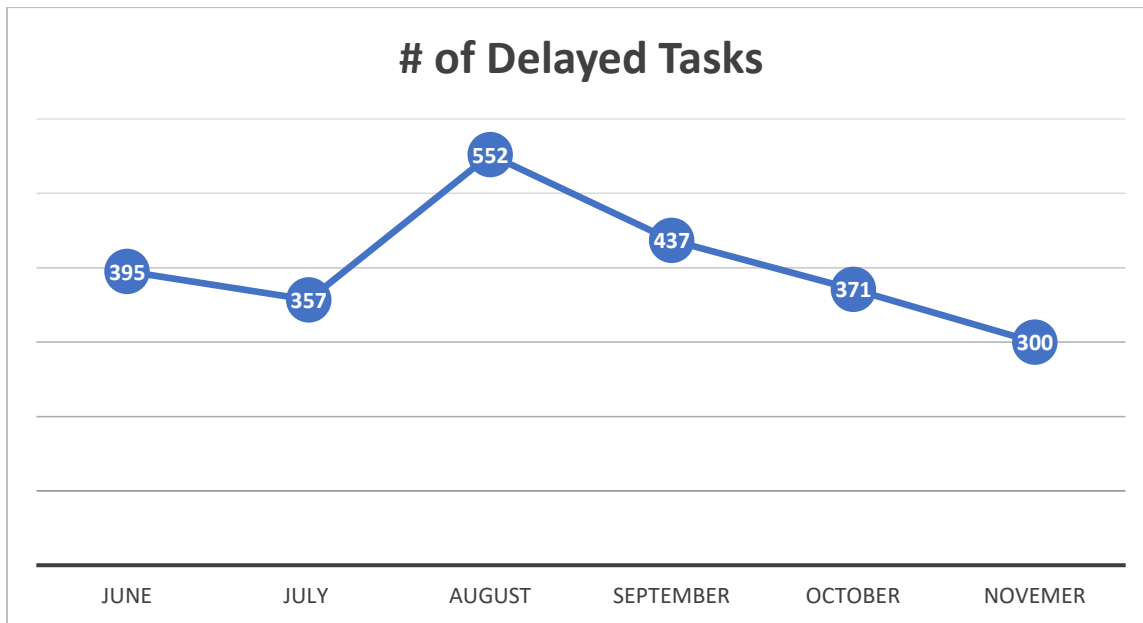
Figure 26: SPI Trend for the Florida PALM Project Schedule



Delayed Tasks Trend for the Florida PALM Project Schedule

The Figure below shows the trend of Delayed Tasks for the Florida PALM Project Schedule over the last six months. Delayed Tasks are defined as tasks that were scheduled to Start or Finish but have not yet been completed.

Figure 27: Delayed Task Trend for the Florida PALM Project Schedule



IV&V Information Requests

The table below includes the outstanding Florida PALM IV&V Team information requests from the Florida PALM Project Team.

Information Request	Date of Request	Status
None	NA	NA

Table 8: IV&V Information Requests

Appendix A – Risk Priority Matrix

The Florida PALM IV&V Analysts will use the following table to assign a Risk probability rating to each identified Risk.

Risk Probability Rating	Probability of Occurrence	Probability Description
1	Improbable	Risk has between a 1%-19% likelihood of occurring.
2	Unlikely	Risk has between a 20%-39% likelihood of occurring.
3	Possible	Risk has between a 40%-59% likelihood of occurring.
4	Likely	Risk has between a 60%-79% likelihood of occurring.
5	Probable	Risk has between an 80%-99% likelihood of occurring.

Table 9: Risk Probability Rating

The Risk Impact Criteria the Florida PALM IV&V Analysts will use to assign a Risk impact rating to each identified Risk are described in the table below.

Risk Impact Rating	Magnitude of Impact	Impact Description
1	Negligible	Risk will have an impact so small that it can be ignored when studying the larger effect.
2	Minor	Risk will have a small impact on the Project that should not be ignored when studying the larger effect.
3	Moderate	Risk will have a noticeable impact on the Project.
4	Significant	Risk will have a significant impact on the Project
5	Critical	Risk will have a significant impact and may jeopardize the success of the Project.

Table 10: Risk Impact Criteria

The table below outlines the Risk Priority Ratings for a Finding based on a combination of impact and probability of occurrence.

Probability of Occurrence	Magnitude of Impact				
	Negligible 1	Minor 2	Moderate 3	Significant 4	Critical 5
Probable 5	Low	Medium	High		
Likely 4			Medium	High	
Possible 3		Medium		High	
Unlikely 2				High	
Improbable 1		Medium		High	

Table 11: Risk Priority Ratings

The table below defines the levels of the Risk Priority Ratings.

Rating	Definition
High	The possibility of substantial impact on product quality manageability cost or schedule. Major disruption is likely, and the consequences would be unacceptable. A different approach is required. Mitigation strategies should be evaluated and acted upon immediately.
Medium	The possibility of moderate impact to product quality manageability cost or schedule. Some disruption is likely, and a different approach may be required. Mitigation strategies should be evaluated and implemented as soon as feasible.
Low	The possibility of a slight impact to product quality manageability cost or schedule. Minimal disruption is likely, and some oversight is needed to ensure that it remains low. Mitigation strategies should be evaluated and considered for implementation when possible.

Table 12: Risk Priority Definitions