Florida PALM
Planning, Accounting, and Ledger Management

Project Sponsor:	*Steven Fielder*	**Project Director:**	*Jimmy Cox*
Status Report Period:	*May 1, 2023 – May 31, 2023*	**Current Project R&C Category:**	*4*
Project Start Date:	*Project funding began July 1, 2014*	**Project End Date:**	*June 30, 2027* *(Funding appropriated through June 30, 2023)*

1 – FLORIDA PALM STATUS OVERVIEW

A. Agency Engagement
Required for R&C Category 1 2 3 4

During the month of May, the Department completed the following:
- Hosted the inaugural Sponsor Summit for the leadership in all agencies to learn, engage and network with colleagues and the Project team
- Hosted the Change Champion Network Town Hall
- Published new agency tasks for the review of agency CCN roles and their access to collaborative Florida PALM resources
- Continued focused conversations with agencies in areas of specific importance and personalized support

B. Implementation Status
Required for R&C Category 1 2 3 4

	Yes	No	Explain:
Is the project on schedule? *If no, explain why and what corrective action(s) are planned to bring the project back on schedule*	✔		The current Project Schedule being used at this time contains key administrative activities, required reporting activities, requirements reviews, and the development of deliverable expectation documents and work product expectation documents supporting implementation activities begun following the execution of Amendment 8 to the SSI Contract on April 26, 2023. Major implementation activity dates have been established. The first Deliverable is a Project Schedule for the next major implementation.
Will the project complete on schedule?	✔		The detailed Project Schedule for the Financials and Payroll Waves is being created as the first Deliverable of Amendment 8 to the SSI Contract.
Is the project currently within budget? *If no, explain why and what corrective action(s) are planned to bring the project back within budget*	✔		The Project is currently within budget.
Will the project remain within budget?	✔		Spend Plan details provided in section four.

B. Implementation Status			Required for R&C Category
	Yes	No	Explain:
Were any Project Change Requests approved during this reporting period?	✔		This PCR removes unnecessary customizations, which is consistent with the Project's goal to carefully consider each customization to determine if it is needed to meet business requirements or to support operations.
Have any risks or issues impacted the project during the reporting period?		✔	No risks or issues impacted the Project during this reporting period. However, with signing of Amendment 8 and updates to the PMP, the project close all risks associated with the previous implementation wave created new equivalent risks for the Financials and Payroll Major Implementation

C. SPI & CPI *Provide SPI and CPI for Current + Last 3 Reporting Periods*				Required for R&C Category
	Past Reporting Period	Past Reporting Period	Last Reporting Period	**Current Reporting Period**
Date	February 2023	March 2023	April 2023	May 2023
Project Schedule Performance Index (SPI)	0.83	0.83	0.85	0.85
Project Cost Performance Index (CPI)	0.98	0.99	0.98	0.94
Explanation of SPI/CPI Variance / Trend	The current Schedule Performance Index (SPI) is 0.85. The current Project Schedule being used at this time contains key administrative activities, required reporting activities, requirements reviews, and the development of deliverable expectation documents and work product expectation documents supporting implementation activities begun following the execution of Amendment 8 to the SSI Contract on April 26, 2023. Major implementation activity dates have been established.			

2 – IMPLEMENTATION MILESTONE PROGRESS

A. Implementation Stage Gate Decision Progress
Provide status tracking for Stage Gate Decisions planned for action by the Project Director and/or Executive Steering Committee and identify the status of each item listed (Completed, In Progress, Future).

Required for R&C Category

Stage Gate Decision Name	Contractual Due Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*
SG1 – Ready to Start Build	TBD	N/A	IP
SG2 – Ready to Begin System Testing	TBD	N/A	F
SG3 – Ready to Begin UAT	TBD	N/A	F
SG4 – Agency Readiness	TBD	N/A	F
SG5 – Deployment Readiness	12/17/2025	N/A	F
SG6 – Confirm Deployment	12/30/2025	N/A	F
SG7 – Go-Live	1/6/2026	N/A	F

B. Scope Changes
List all scope changes (any changes from the original project objectives and deliverables that impact the project schedule or budget) identified during this reporting period, including those that may impact the project in later reporting periods.

Required for R&C Category

Scope Change Description	Cost Impact	Schedule Impact	Status *(if approved, include approval date and change control form number)* / Variance Explanation / Comment
PCR 99 - Remove C59 and C65 Customizations	Low	Low	Approved by the ESC on May 24, 2023.

3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues
List all issues identified, open, occurring, or closed within this reporting period related to implementation of the Financials or Payroll Waves.

Required for R&C Category

Issue Description	Status (Open/ Closed)	Priority	Resolution Approach	Resolution Date	Owner
N/A					

B. Implementation Risks *List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.*				Required for R&C Category	
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Status	Owner
The Project may have negative impacts if insufficient staffing occurs.	Open	3	The Project will track the status of all positions to identify, where possible, which positions will be coming vacant and when. The Project will use at a minimum the following resources and strategy to decrease the time needed to bring the team member up to speed and fill vacancies quickly: 1. Florida PALM Orientation and Onboarding materials and process 2. Standard Operating Procedures 3. Florida PALM Project Management Plan 4. Project Team member mentoring 5. Accenture Staffing Plan The Project will also: 1. Identify backups for decision making resources to be kept informed and able to assist if a position is vacated unexpectedly or a replacement is not on-boarded timely 2. Hold regular staff meetings with the Team Managers, Project Architects and Project Directors to provide updates on Project progress, planning, and needs 3. Where possible, hire replacements to overlap current resources and allow for knowledge transfer 3. Keep the ESC and Executive Sponsor informed of staffing issues as appropriate 4. Monitor the SSI contractor staffing plan to ensure alignment with the SSI contract SOW	Stable	Jimmy Cox

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Status	Owner
External stakeholders (e.g., Legislature, EOG) expectations may not be aligned with the Florida PALM cost, schedule, or scope.	Open	3	Project Directors will provide Project cost, schedule, and scope updates to external stakeholders regularly using the monthly Project status report, other required reports per Proviso, legislative meetings (e.g., committee meetings) and other ad hoc opportunities.	Stable	Jimmy Cox
Budget related events may impact Project cost	Open	3	The Project will utilize one or more of the following mitigations to manage the risk: 1. Use the weekly RADAR process to record schedule task progress and to identify potential delays 2. Work with task owners and coordinators for deliverables at risk of delay to keep deliverables on schedule 3. Notify Project Leadership as soon as potential delays are identified 4. Actively communicate budget needs 5. Submit clear budget related documentation, including the monthly spend plan, in a timely manner 6. Consider all available solutions to unplanned needs	Stable	Jimmy Cox

B. Implementation Risks				Required for R&C Category		
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.						
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Status	Owner
Agency participation levels may impact agency readiness	Open	6	The Project will utilize one or more of the following mitigations to manage the risk: 1. Conduct monthly meetings between Readiness Coordinators and agency Change Champion Network members to discuss their internal readiness and preparation to transition to Florida PALM 2. Conduct meetings with between Project leadership and Agency Sponsors to discuss the agency's progress and any concerns, needs, or roadblocks the agency is facing in their transition activities 3. Lead meetings and workshops designed to share timely and relevant information with agencies throughout the project lifecycle 4. Provide tools and information (e.g., graphics and content) to support messaging and communication within the agency regarding key implementation activities and change impacts	Stable	Jimmy Cox

The timing and efficiency of information sharing between enterprise partners could impact the success of the Project	Open	3	The Project will leverage existing meetings and schedule additional as needed to discuss:
			
			1. The Project's timeline and status identifying timing for key work to be completed
			2. Projected changes to:
			   a. enterprise systems and their potential impact on the Project
			   b. the Project and its potential impact on enterprise systems
			3. Progress of integration
			4. The Project will look for potential connections between the applications and Florida PALM identified during design and development and their impacts to enterprise partners
				Stable	Jimmy Cox

4 – SPEND PLAN

The Florida PALM Project was appropriated $63,548,688 for FY 2022-23. As of the end of this reporting period, $34,985,897 in expenses have been projected, $39,402,228 of the appropriated funds have been released, $34,688,794 in expenses have been incurred, and $32,849,456 has been paid. See the Florida PALM Project Spend Plan for additional details.

5 – REMEDIATION AND TRANSITION TASKS REQUIRED TO REPLACE FLAIR

Remediation and Transition Tasks			Required for R&C Category
Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).			
Task Name	Due Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*
*Additional tasks will be defined once the Project Schedule is complete	TBD	N/A	F

6 – TRAINING AND STAFFING FOR HELP DESK AND PRODUCTION SUPPORT.

Training and Staffing Plan			Required for R&C Category
Provide the status of the implementation of a training and staffing plan for the Florida PALM help desk and production support utilizing current help desk and FLAIR resources and identify the status of each item listed (Completed, In Progress, Future).			
Task Name	Due Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*
Q4 Update to the Training Plan	6/30/2023	N/A	IP
Q4 Update to the Staffing Plan	6/30/2023	N/A	IP

7 – SYSTEM INTERFACE AND AGENCY APPLICATION REMEDIATION

See the Florida PALM Agency Status Report for May 2023 for an update on the progress and cost of each system interface and agency application remediation task, as provided by agencies, required for deployment of Florida PALM functionality.