

<b>Project Sponsor:</b>	Steven Fielder	<b>Project Director:</b>	Jimmy Cox
<b>Status Report Period:</b>	July 1, 2023 – July 31, 2023	<b>Current Project R&amp;C Category:</b>	4
<b>Project Start Date:</b>	Project funding began July 1, 2014	<b>Project End Date:</b>	July 19, 2027 (Funding appropriated through June 30, 2024)

## 1 – FLORIDA PALM STATUS OVERVIEW

### A. Agency Engagement Required for R&C Category

During the month of July, the Department completed the following:

- Published the quarterly update for [Project reporting activities](#) for the Financials and Payroll Waves
- Increased communication engagement by publishing agency communications on the [Florida PALM website](#)
- Hosted a [forum](#) for agency CCN Change Management Liaisons and Training Liaisons, providing a highly collaborative environment for sharing ideas, engaging and asking questions, and making contacts/network with each other in-person
- Shared the approach and timeframe for reviewing the final [solution designs](#) by segments to agencies
- Published a new [task](#) for agencies to document their current business processes
- Continued focused conversations with agencies in areas of specific importance and personalized support

### B. Implementation Status Required for R&C Category

	Yes	No	Explain:
<b>Is the project on schedule?</b> <i>If no, explain why and what corrective action(s) are planned to bring the project back on schedule</i>	✓		The Project Schedule includes implementation activities to be completed through Go Live in January 2026 and through post-implementation support. Major implementation activity and Stage Gate dates have been established.
<b>Will the project complete on schedule?</b>	✓		The accepted Project Schedule shows the solution going live on January 6, 2026.
<b>Is the project currently within budget?</b> <i>If no, explain why and what corrective action(s) are planned to bring the project back within budget</i>	✓		The Project is currently within budget.
<b>Will the project remain within budget?</b>	✓		Spend Plan details provided in section four.

<b>B. Implementation Status</b>			Required for R&C Category <span style="float: right;">1 2 3 4</span>
	Yes	No	Explain:
<b>Were any Project Change Requests approved during this reporting period?</b>	✓		Project Change Requests (PCR) 100 and 101 were approved during this period.
<b>Have any risks or issues impacted the project during the reporting period?</b>		✓	No new risks or issues have been identified.


<b>C. SPI</b> <i>Provide SPI for Current + Last 3 Reporting Periods</i>					Required for R&C Category <span style="float: right;">3 4</span>
	Past Reporting Period	Past Reporting Period	Last Reporting Period	<b>Current Reporting Period</b>	
<b>Date</b>	April 2023	May 2023	June 2023	July 2023	
<b>Project Schedule Performance Index (SPI)</b>	*0.85	*0.85	*0.99	0.78	
<b>Explanation of SPI Variance / Trend</b>	The current SPI is 0.78. This is the first report based on the new Project Schedule. This Schedule includes all activities needed to implement the Florida PALM Financial/Payroll Waves.  *The current Project Schedule was released for use as of July 1, 2023. The April, May, and June 2023 SPIs were calculated based on the previous Schedule.				


## 2 – IMPLEMENTATION PROGRESS

<b>A. Stage Gate Decision (Milestones and Critical Path Items)</b> <i>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).</i>			
			Required for R&C Category <span style="float: right;">2 3 4</span>
Stage Gate Decision Name	Contractual Due Date	Actual Finish Date <i>(completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
SG1 – Ready to Start Build	12/29/2023	N/A	IP
SG2 – Ready to Begin System Testing	8/30/2024	N/A	IP
SG3 – Ready to Begin UAT	3/28/2025	N/A	F
SG4 – Agency Readiness	11/26/2025	N/A	IP
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>B. Scope Changes</b> <i>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.</i>			
			Required for R&C Category <span style="float: right;">2 3 4</span>
Scope Change Description	Cost Impact	Schedule Impact	Status <i>(if approved, include approval date and change control form number) / Variance Explanation / Comment</i>
PCR 100 - IAM Remove User Roles	NA	NA	Approved on 07/20/2023 - Implementation in progress during this reporting period
PCR 101 - Attachment 5.1 and 5.2 Changes	NA	Low	Approved on 07/26/2023 - Implementation in progress during this reporting period

### 3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues <span style="float: right;">Required for R&amp;C Category </span>					
<i>List all issues identified, open, occurring, or closed within this reporting period related to implementation of the Financials or Payroll Waves.</i>					
Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
N/A					

B. Implementation Risks <span style="float: right;">Required for R&amp;C Category </span>					
<i>List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Status	Owner
Risk 4 - Agency participation levels may impact agency readiness	Open	6	The Project will utilize one or more of the following mitigations to manage the risk: <ol style="list-style-type: none"> <li>1. Conduct monthly meetings between Readiness Coordinators and agency Change Champion Network members to discuss internal readiness and preparation to transition to Florida PALM.</li> <li>2. Conduct meetings between Project leadership and Agency Sponsors to discuss the agency’s progress and any concerns, needs, or roadblocks that the agency is facing in their transition activities.</li> <li>3. Lead meetings and workshops designed to share timely and relevant information with agencies throughout the Project lifecycle.</li> <li>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.</li> </ol>	Mitigating	Carolyn Hicks

<b>B. Implementation Risks</b>					
<i>List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Status	Owner
Risk 6 - The execution of contracts and procurement activities outside of the Project may impact Florida PALM implementation and agency readiness	Open	6	The Project will utilize one or more of the following strategies to manage the risk: 1. Provide the Project's timeline and key Project dates essential for agency and enterprise partner readiness (e.g., milestones). 2. Engage regularly with agency and enterprise partners to share information and to report progress towards key milestone dates. 3. Request updates and status reporting on key readiness activities. 4. Provide support or information to support agency, enterprise partner, or oversight body planning or decision making or needs.	Mitigating	Angie Robertson

## **4 – SPEND PLAN**

The Florida PALM Project was appropriated \$63,254,642 for FY 2023-24. As of the end of this reporting period, \$20,735,011 has been released, \$8,138,809 has been projected, \$7,733,489 has been incurred, and \$6,979,840 has been paid. See the Florida PALM Project Spend Plan for additional details.

## **5 – REMEDIATION AND TRANSITION TASKS REQUIRED TO REPLACE FLAIR**

<b>Remediation and Transition Tasks</b>			
<i>Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).</i>			
Task Name	Due Date	Actual Finish Date (Completed)	Status (C=Completed IP= In Progress F=Future)
<b>Stage Gate 1 – Ready to Start Build</b> (includes the following critical path items): <ul style="list-style-type: none"> <li>Project Schedule (D635) – <b>Accepted</b></li> <li>Solution Design – Segment I (D636) – <b>In Progress</b></li> <li>Solution Design – Segment II (D637)</li> <li>Update Process Models – Financials – Segment I (I-WP101) – <b>In Progress</b></li> <li>Update Process Models – Financials – Segment II (I-WP101)</li> </ul>	12/29/23	N/A	IP

<b>Remediation and Transition Tasks</b>			
<i>Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).</i>			
Task Name	Due Date	Actual Finish Date <i>(Completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
<b>Stage Gate 2 – Ready to Begin System Testing</b> (includes the following critical path items): <ul style="list-style-type: none"> <li>• Solution Design – Segment III (D638)</li> <li>• Process Models – Payroll (D639) – <b>In Progress</b></li> <li>• Master Data Configuration Workbooks (D640)</li> <li>• Updated Technical Architecture Design (D642)</li> <li>• Update Process Models – Financials – Segment III (I-WP101)</li> <li>• Build – Segment I (D646)</li> <li>• Solution Design – Segment IV (D644)</li> <li>• Update Process Models – Financials – Segment IV (I-WP101)</li> <li>• Environment Builds – System Test Environment</li> </ul>	08/30/24	N/A	IP
<b>Stage Gate 3 – Ready to Begin UAT</b> (includes the following critical path items): <ul style="list-style-type: none"> <li>• Establish DW/BI Environments (D647)</li> <li>• Build – Segment II (D648)</li> <li>• Security Roles Matrix (WP405)</li> <li>• Environment Builds – Mock Conversion Test Environment</li> <li>• Environment Builds – Interface Test Environment</li> <li>• Solution Design – DW/BI (D650)</li> <li>• Mock Conversion I (D651)</li> <li>• Build – Segment III (D649)</li> <li>• Build – DW/BI – Segment I (D653)</li> <li>• System Test – Segment I (D652)</li> <li>• Mock Conversion II (System Test) (D655)</li> <li>• Build – Segment IV (D654)</li> <li>• Build – DW/BI – Segment II (D659)</li> <li>• Environment Builds – UAT Test Environment</li> <li>• System Test – Segment II (D656)</li> <li>• Build – DW/BI – Segment III (D668)</li> <li>• Mock Conversion III (UAT) (D657)</li> <li>• System Test – DW/BI (D661)</li> </ul>	03/28/25	N/A	F

<b>Remediation and Transition Tasks</b>			
<i>Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).</i>			
Task Name	Due Date	Actual Finish Date <i>(Completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
<b>Stage Gate 4 – Agency Readiness</b> (includes the following critical path items): <ul style="list-style-type: none"> <li>• Training Build (I-WP110)</li> <li>• Role Mapping Worksheet (I-WP118)</li> <li>• Readiness Workplan (I-WP126) – <b>In Progress</b></li> <li>• Agency Readiness Certification (I-WP128)</li> </ul>	11/26/25	N/A	IP
<b>Stage Gate 5 – Deployment Readiness</b> <ul style="list-style-type: none"> <li>• Environment Builds – Disaster Recovery Test Environment</li> <li>• Deployment and Contingency Plan (D658)</li> <li>• Environment Builds – Dry Run Test Environment</li> <li>• Environment Builds – Performance Test Environment</li> <li>• Mock Conversion IV (D662)</li> <li>• Interface Testing – Segment I (D663)</li> <li>• Regression Testing (WP416)</li> <li>• Mock Go-Live – Dry Run #1 (D667)</li> <li>• Disaster Recovery Testing (D676)</li> <li>• Payroll Parallel Testing (D670)</li> <li>• Interface Testing – Segment II (D671)</li> <li>• Mock Go-Live – Dry Run #2 (D673)</li> <li>• Penetration Testing (D674)</li> <li>• Performance Testing (D675)</li> <li>• Final Known Issues &amp; Enhancements List (D678)</li> <li>• Mock Go-Live – Dry Run #3 (D677)</li> </ul>	12/17/25	N/A	F
<b>Stage Gate 6 – Confirm Deployment</b>	12/30/25	N/A	F
<b>Stage Gate 7 – Go-Live</b>	01/06/26	N/A	F

## **6 – TRAINING PLANS**

<b>Training Plans for Department Staff</b>			
<i>Provide the status of the implementation of training plans for Department staff and identify the status of each item listed (Completed, In Progress, Future).</i>			Required for R&C Category <span style="float: right;">2 3 4</span>
Deliverable / Work Product / Activity Name	Due Date	Actual Finish Date <i>(Completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
Update Training Strategy (I-WP122)	02/29/24		F
Update Training Deployment and Measurement Plan (I-WP123)	02/29/24		F
ILT Training Delivery Plan (I-WP113)	06/28/24		F
UAT Training Materials (I-WP111)	02/13/25		F
Training Curriculum (I-WP108)	11/15/24		IP
Training Designs (I-WP109)	05/29/25		F
Training Build (I-WP110)	06/10/25		F
End User Manual (I-WP112)	08/05/25		F
Train the Trainer (I-WP115)	08/08/25		F
Conduct Training	11/26/25		F

## **7 – REMEDIATION PROGRESS OF AGENCY BUSINESS SYSTEMS**

<b>Remediation Progress of Agency Business Systems</b>
<i>Provide an update on the remediation progress for each agency business system required for deployment of PALM functionality.</i>
Chapter 2023-240 Implementing the 2023-2024 General Appropriations Act directs agencies to submit bi-monthly status reports to the Florida PALM Executive Steering Committee. The first report is due September 1, 2023. The Project is developing a resource to share this information with stakeholders via the Project’s public website. A reference to that resource will be added to this section for all Project status reports beginning in September 2023.